Business Intelligence for MYOB

User Manual

v3.3

Lite · Professional · Enterprise

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Overview

What All the Excitement is About…

Making the right decisions based on the best information obtainable is critical to the survival of every enterprise. BIforMYOB is a revolutionary new and powerful set of tools, designed to enable managers obtain the best data to support their business decisions. BIforMYOB applications can generate versatile data reports covering all your company's activities and can be readily exported into other systems.

This manual documents how to get started with BIforMYOB and produce precision-targeted reports within minutes.

The software outlined in this manual will enable you to select the data you want to see and the format in which you want to see it presented. You will be able to drill down into your organisation's data to review all aspects of performance; make comparisons; generate detailed visual displays and reports; compare fields, dates, costs, margins and much, much more.

BIforMYOB Version 3.3 has been designed to provide managers with the versatility to look at their organisation's performance in new ways, enabling them to make the absolutely best informed decisions at all times. Whether you want to interpret your sales, stocks, costs, margins, revenues, staff performances or trends, BIforMYOB will enable you to make direct and instant comparisons using up to five separate fields which you can select by day, week, month, quarter or year and compare with any period you choose, enabling you to instantly identify every possible trend effecting your organisation's performance.

The following pages will show you how to select, filter, display, report and drill into your organisation's data. We think you will find it surprisingly easy to use, and surprisingly helpful in running your business in the future.

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Chapter 1 - Getting Started

Your Journey Begins…

To start using BIforMYOB, you'll need to have a **Login Name** and **Password** assigned to you by your system administrator. These will give you access to BIforMYOB and the data appropriate to your needs.

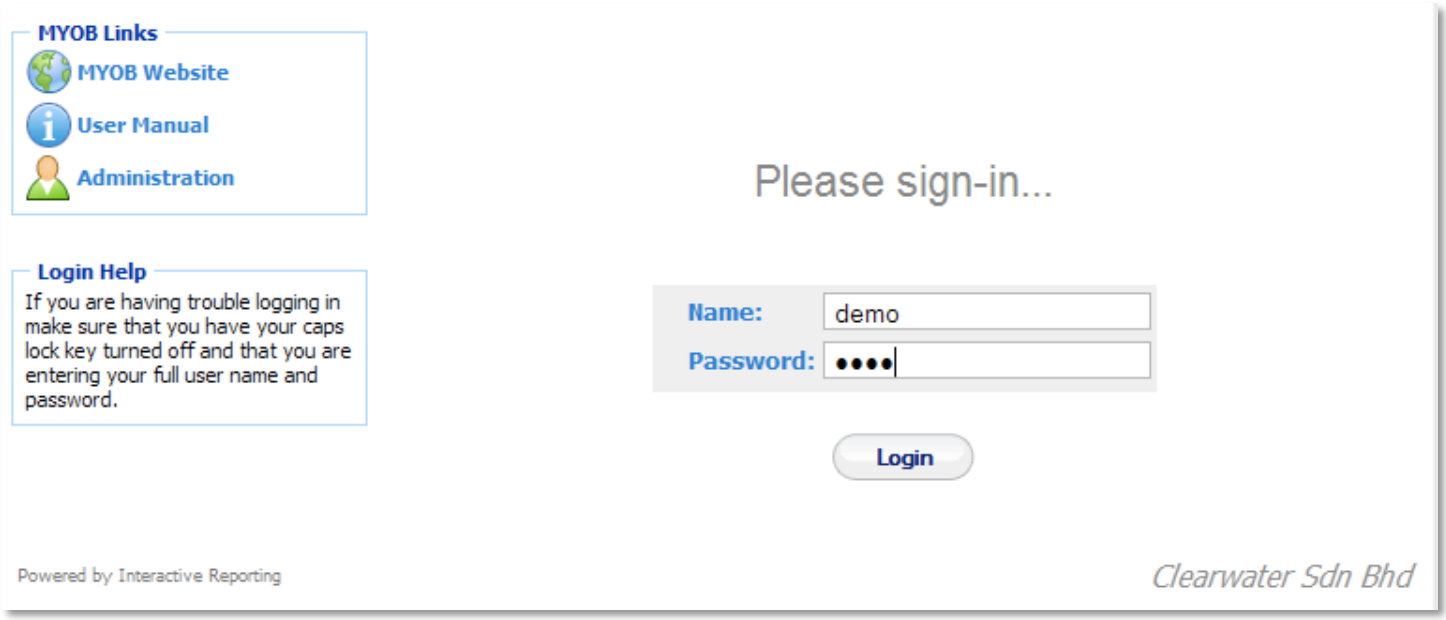

Figure 1

Simply open your preferred web browser (i.e. Internet Explorer, Firefox, Safari etc.) and navigate to the BIforMYOB **Login Screen** (your system administrator will give you the URL web address), Figure 1.

Enter the **Login Name** and **Password** that your system administrator has given you, and click 'Login' (in the above example, user demo is signing-in). [1]

Once you have signed-in, you will be taken to the **'Favorites'** page and from here you can select different companies to run the standard accounting and payroll favorite reports.

The Company name will be seen on the bottom right corner of the page. This will be present at the same position in every page of BIforMYOB.

The **'MYOB Links'** sidebar menu provides a list of related links associated with the general use of BIforMYOB:

- The **'MYOB Website'** link redirects to the BIforMYOB web page.
- The **'User Manual'** link provides access to this documentation.
- The **'Administration'** link redirects to the administration part of BIforMYOB.

1.1 Choose Report

Alternatively, In the **'Companies'**, **'Choose Company'**, **'Choose Report'** section, Figure 2, there is a list of reports for the user to select from. Each report has two links associated with it. This first link is the **Report Name**, for example **MYOB Premier Item Sales**, which when clicked it directs the user to the wizard pages to generate less complex reports. The second link is the **'Advanced'** link, which directs the user to the advanced

[1] Please note that for the remainder of this Manual our examples will be drawn from MYOB's Clearwater sample database.

report generation page. This step is intended for users who are quite familiar with BIforMYOB and computer systems.

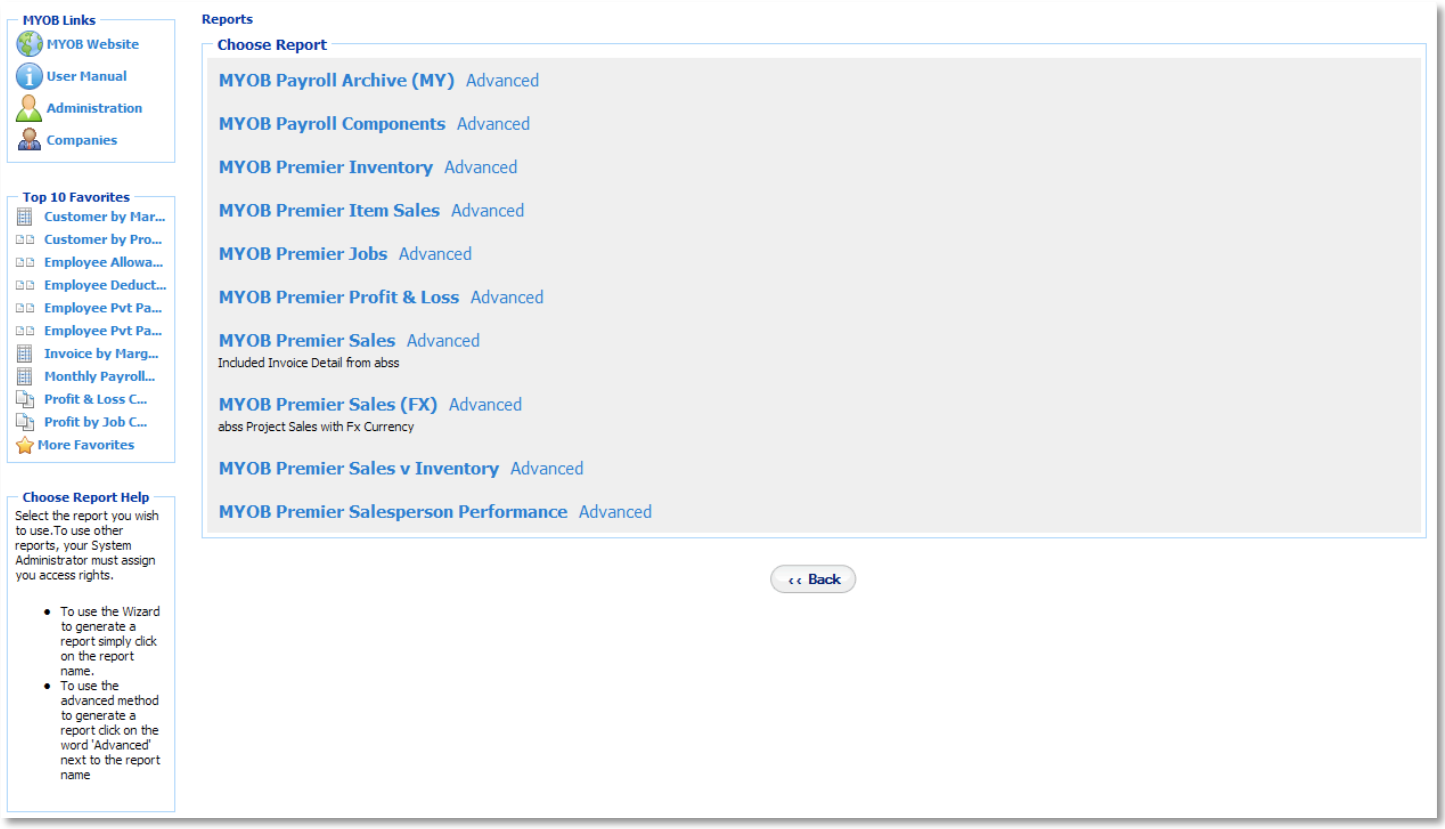
MYOB Links
MYOB Website
User Manual
Administration
Companies
Top 10 Favorites
Customer by Mar...
Customer by Pro...
Employee Allowa...
Employee Deduct...
Employee Pvt Pa...
Employee Pvt Pa...
Invoice by Marg...
Monthly Payroll...
Profit & Loss C...
Profit by Job C...
More Favorites
Choose Report Help
Select the report you wish to use.To use other reports, your System Administrator must assign you access rights.
To use the Wizard to generate a report simply click on the report name.
To use the advanced method to generate a report click on the word 'Advanced' next to the report name
Reports
Choose Report
MYOB Payroll Archive (MY) Advanced
MYOB Payroll Components Advanced
MYOB Premier Inventory Advanced
MYOB Premier Item Sales Advanced
MYOB Premier Jobs Advanced
MYOB Premier Profit & Loss Advanced
MYOB Premier Sales Advanced
Included Invoice Detail from abss
MYOB Premier Sales (FX) Advanced
abss Project Sales with Fx Currency
MYOB Premier Sales v Inventory Advanced
MYOB Premier Salesperson Performance Advanced
‹‹ Back

Figure 2

1.2 Top 10 Favorites

The **'Top 10 Favorites'** task bar at the left side of the **'Choose Report'** page, Figure 2, allows the user to view directly one of the 10 most popular previously saved reports. More favorites can be viewed by clicking the **'More Favorites'** link at the bottom of the task bar. This task bar is also available at the wizard and advanced report pages.

1.3 About

When the **'About'** link of the upper right corner of the **'Choose Report'** page, Figure 2, is clicked, a popup box appears. This contains two pieces of information, the version of the current BIforMYOB and the date at which this version was created.

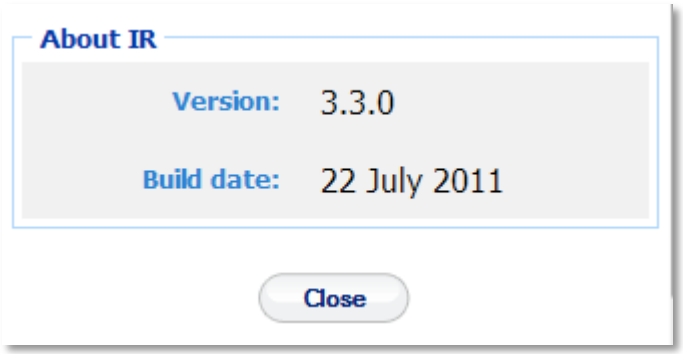

Figure 3

1.4 Change Password

BIforMYOB provides the facility for a user to change their password without having to contact the System Administrator. To change a password the user must click on the **'Change Password'** link at the top of the **'Choose Report'** page. The user will be then directed to the screen of Figure 4. To change Password, type the current password into the **'Current Password'** box and the new password into the other two boxes. Then press **'Update'**. If the password is incorrect a message will appear with details about which part of the process was not performed properly. Once the procedure has been completed correctly the user is returned to the **'Choose Report'** page, if a selection of reports is available. Otherwise, they are returned to the **'Report Type'** Page.

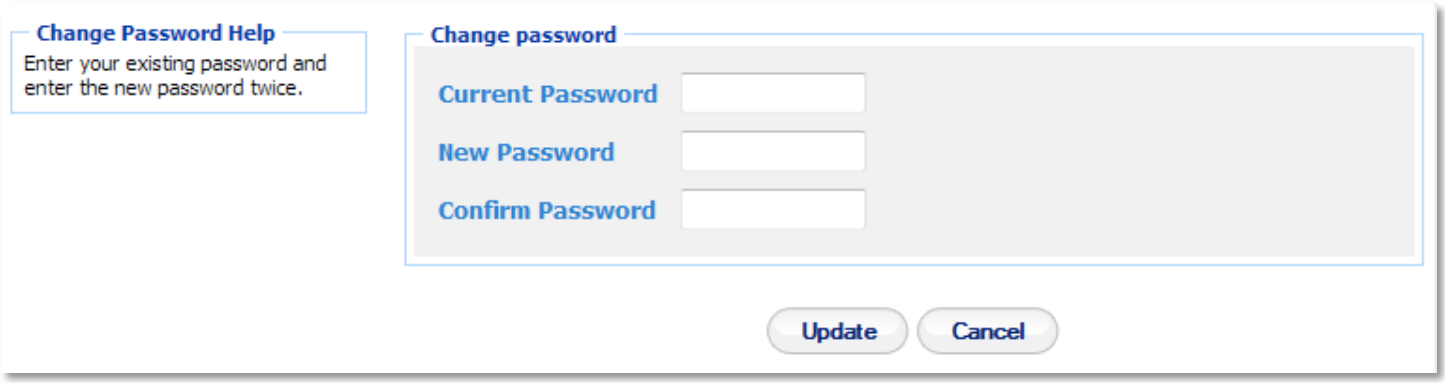

Figure 4

1.5 Logout

The **'Logout'** link logs out the current user, whose user name is shown after the semi-colon. In Figure 2 the user's name is **demo**, as can be seen in the top right corner. Once the logout link is pressed the user is directed to the main login screen, Figure 1.

Chapter 2 – Generating Wizard Reports

Putting BIforMYOB to Work…

BIforMYOB provides a simple and easy-to-use Wizard interface to access your company's data. It provides a point-and-click means of specifying the sales data you wish to analyse.

2.1 Report Type

The **'Report Type'** page, Figure 5, allows the user to choose from one of six options in generating a report.

- **'Standard Report'** to generate Analyze by reports by using the wizard interface.
- **'Chart Report'** to generate Chart reports by using the wizard interface.
- **'Pivot Report'** to generate Pivot reports by using the wizard interface.
- **'Comparison Report'** to generate Comparison reports by using the wizard interface.
- **'Advanced Reporting'** to use the more complex BIforMYOB interface for the generation of reports.
- **'View Favorites'** to view and select reports from previously saved favorites.

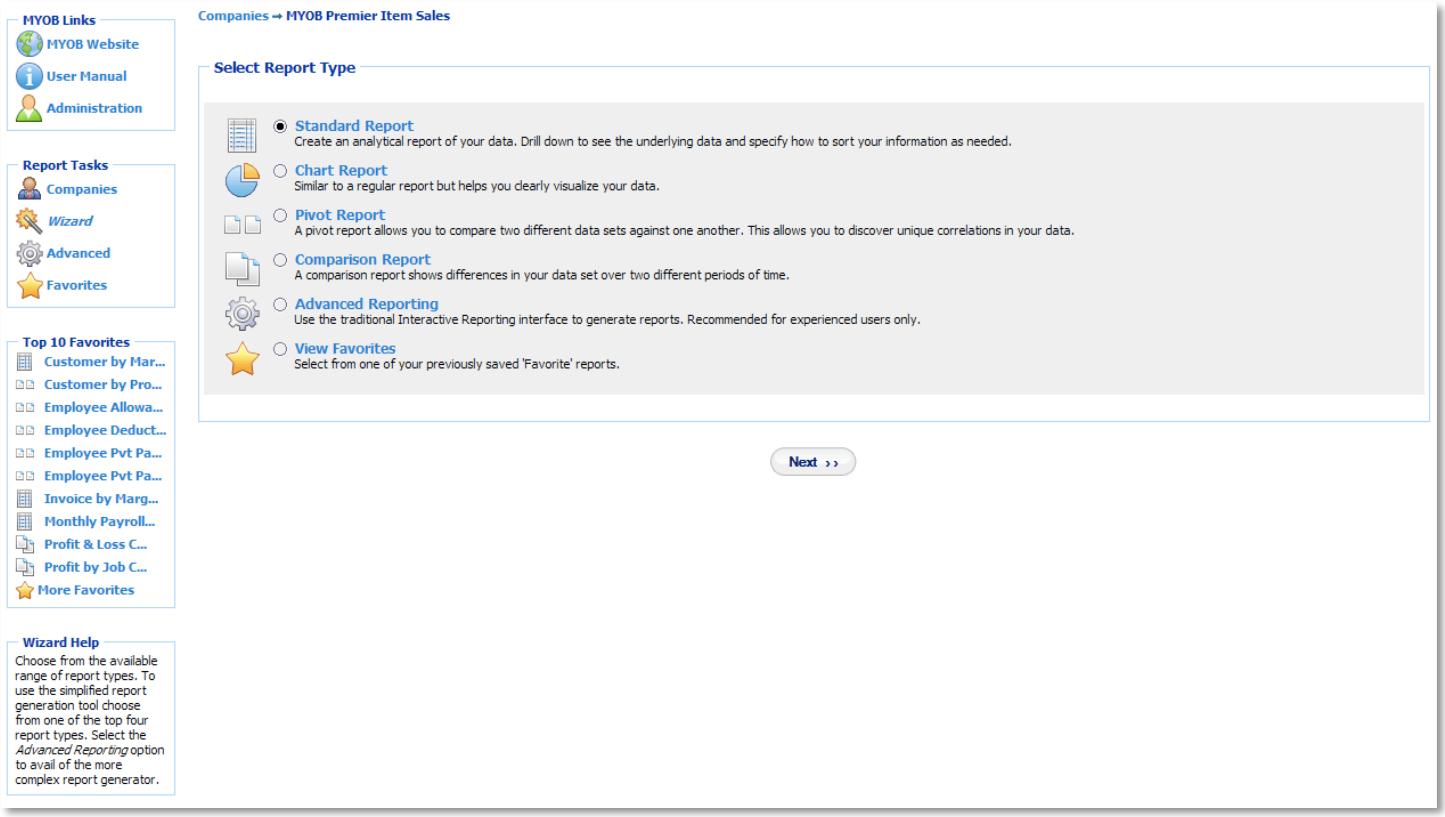
MYOB Links
MYOB Website
User Manual
Administration
Report Tasks
Companies
Wizard
Advanced
Favorites
Top 10 Favorites
Customer by Mar...
Customer by Pro...
Employee Allowa...
Employee Deduct...
Employee Pvt Pa...
Employee Pvt Pa...
Invoice by Marg...
Monthly Payroll...
Profit & Loss C...
Profit by Job C...
More Favorites
Wizard Help
Choose from the available range of report types. To use the simplified report generation tool choose from one of the top four report types. Select the Advanced Reporting option to avail of the more complex report generator.
Companies → MYOB Premier Item Sales
Select Report Type
Standard Report
Create an analytical report of your data. Drill down to see the underlying data and specify how to sort your information as needed.
Chart Report
Similar to a regular report but helps you clearly visualize your data.
Pivot Report
A pivot report allows you to compare two different data sets against one another. This allows you to discover unique correlations in your data.
Comparison Report
A comparison report shows differences in your data set over two different periods of time.
Advanced Reporting
Use the traditional Interactive Reporting interface to generate reports. Recommended for experienced users only.
View Favorites
Select from one of your previously saved 'Favorite' reports.
Next ››

Figure 5

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2.2 Standard Report

When the **'Standard Report'** option is selected and the **'Next'** button clicked the user is directed to the **'Choose Analysis Report Parameters'** page. As can be seen from Figure 6, a number of options must be selected at this time.

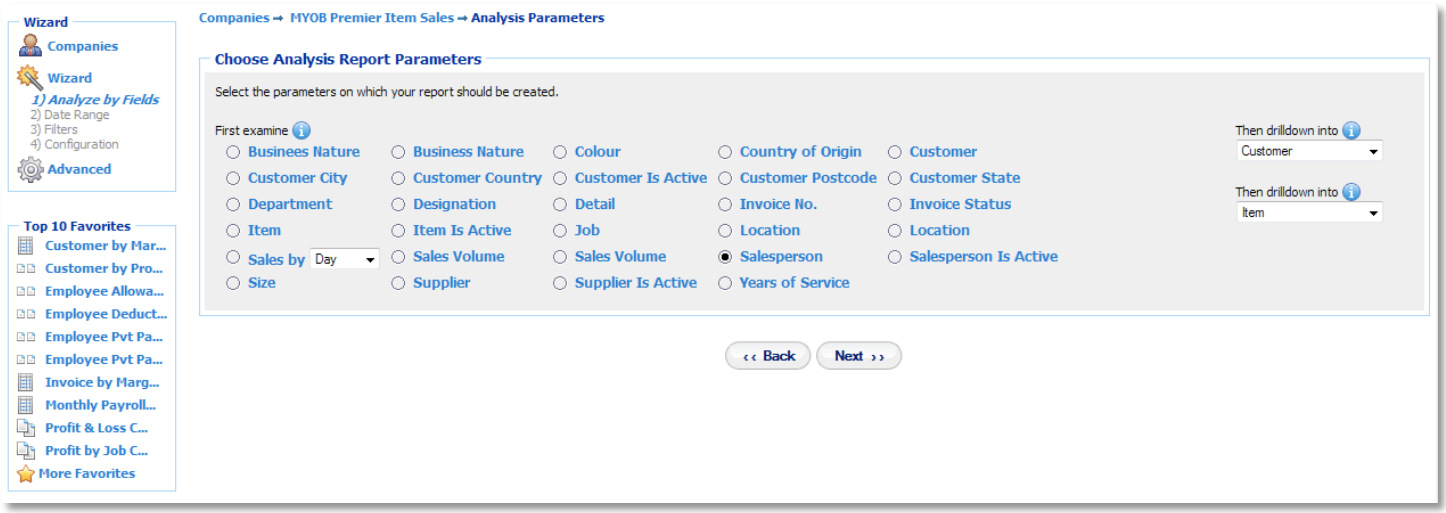


Figure 6

The first option to select is the list on the left side of the screen under the **'First Examine'** title. This is the value upon which the first level of data is shown when the report is generated. In the above example of Figure 6 the **Salesperson** has been chosen. This will result in a report on Salesperson data being generated.

The next options to select correspond to the deeper levels of the report. These can be seen on the right side of the page under the heading **'Then drilldown into'**. There will be a list of these dropdown boxes to select from, their level within the report being reflected by their position from the top of the page. In the above example the second Level option is set to **Customer** and the third level option is set to **Items**. When the report is generated the data presented will be for Salesperson. When a specific Salesperson is selected, the data generated will be the customers specific to this Salesperson. When a specific customer is then selected, the data generated for the next level of the report will be the data for the items supported by the customer. The customer may have other salespersons but their information will not be included in the report.

The **'Wizard'** sidebar menu offers a list of options to enable the user to navigate between general pages of BIforMYOB when setting up the report.

- The **'Report'** link redirects the user to the **'Choose Report'** page of Figure 2.
- The **'Wizard'** list links allows the user to navigate between the various wizard pages. Only links to previously visited wizard pages are activated with all other links being greyed out until the pages are visited.
- The **'Advanced'** link redirects the user to the advanced interface for the report generation.

2.3 Choosing the Date Range

The next step in the wizard report generation is to choose the date range from which the data will be extracted, as shown in Figure 7. BIforMYOB provides a number of predetermined date ranges that may be chosen from the drop down menu of **'Date Range'**. These include: Last Year, YTD (Year to Date), Last Quarter, Yesterday and many more. If the user would prefer to enter their own specific date range then there are two options available to them. The first is to type the initial and final dates into the **'Start Sales Date'** and **'End Sales Date'** fields, respectively. The second option is to click on the calendar next to the date box and select the dates from there. From this point the user may generate the report by clicking the **'Finish'** button. However, if the user wishes to place more restrictions on the data they wish to view they should click on the **'Next'** button. If the user wishes to make amendments to some of the settings they have already chosen, this may be achieved by either pressing the **'Back'** button or navigating through the **'Wizard'** sidebar menu links.

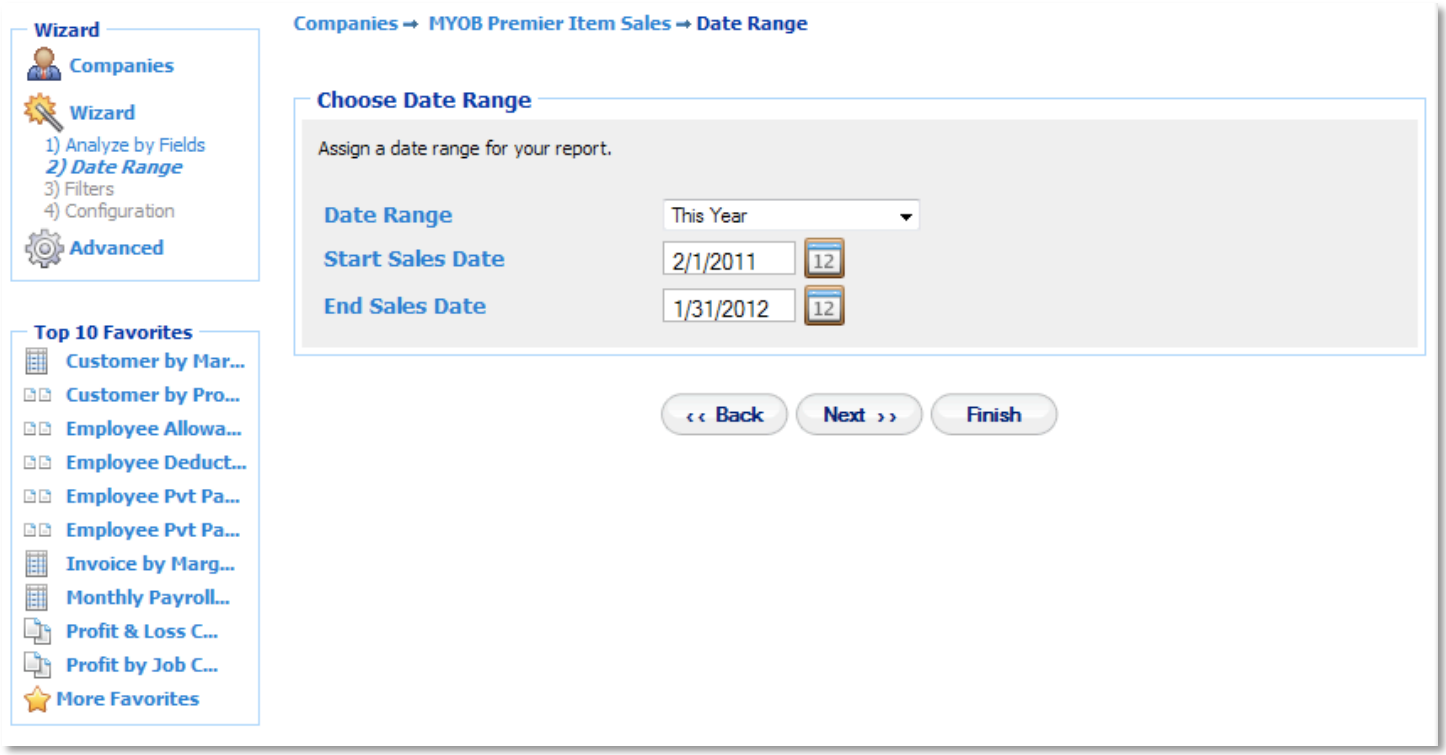


Figure 7

2.4 Filtering Data

The next level for the generation of a report is the application of specific filters if required. In Figure 8 the three main types of data selection boxes can be seen: the **multi-select combo box,** the **single-select combo box** and **the text box**. Multi-select combo boxes allow the user to select multiple items from the scrollable list. To select multiple filter values hold down the CTRL key when making the selections. The second option available is the single select combo-box. Only one filter value (i.e. how you choose to select or 'Filter' the data) may be selected from this list at a time. The final option is the text box, e.g. the **Invoice No.** Filter. To make a selection from this option simply type the filter value of request into the text box. If this box is left blank then all the values of this field will be included in the report. To reset any filter selections the user can click the **'Reset'** link at the top right corner of the filters page.

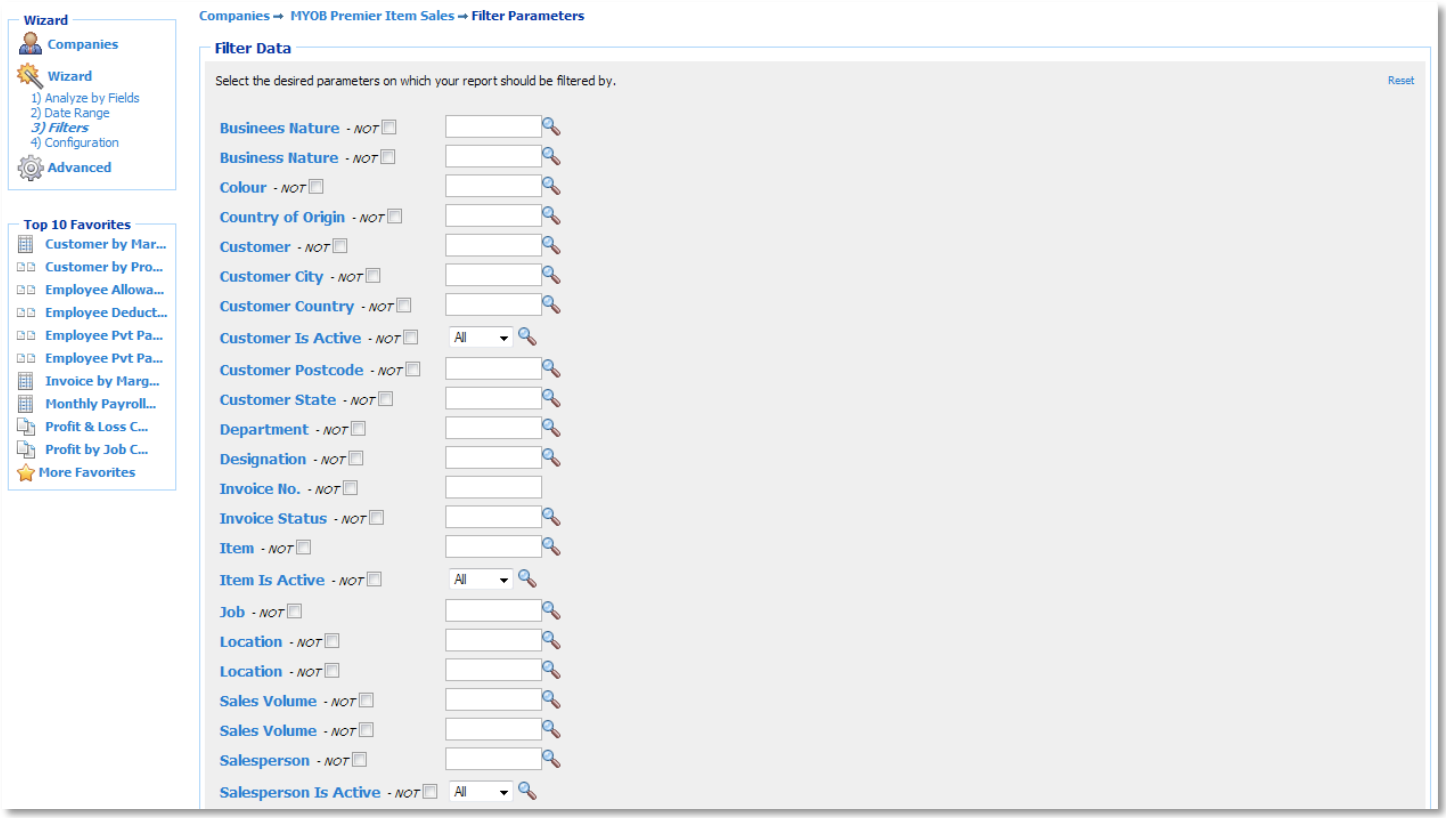


Figure 8

2.5 Not Filter

The **'Not Filter'** allows the user to conduct an analysis excluding specific elements of a filter.

2.6 Search

Another method for selecting which data to place in the reports is to click on the **Magnifying Glass** next to the filter types, or **'Search Icon'**, as can be seen in Figure 8. Then a new window appears shown on Figure 9. In this example the search box for the Item is shown. As Item is a multi-select box the **'>>'** and **'<<'** buttons are present, in addition to the single selection **'>'** and **'<'** ones, which allow for multi selections and removals.

To order the filter values click double click the column headings. To select a filter value that should be included in the report, either highlight it in the '**Search Results'** section and click the relevant arrow button, or double click it. For example, highlight *Cooler Filter Large* and then click the **'>'** button. The filter values displayed in the **'Search Results'** or in the **'Selection'** section are ordered **by 'First Column', 'Code',** or **'Description'** depending on the choice made for the filter ordering in the Administration system settings or mapping preferences.

'First Column' means that the filter values will be sorted by the first column of the tables. By **'Code'** or by **'Description'** means that the filter values present will be sorted by the mapped key or mapped description values, respectively. Clicking on the column headings will also allow the user to change the order of the filter values in the search popup window.

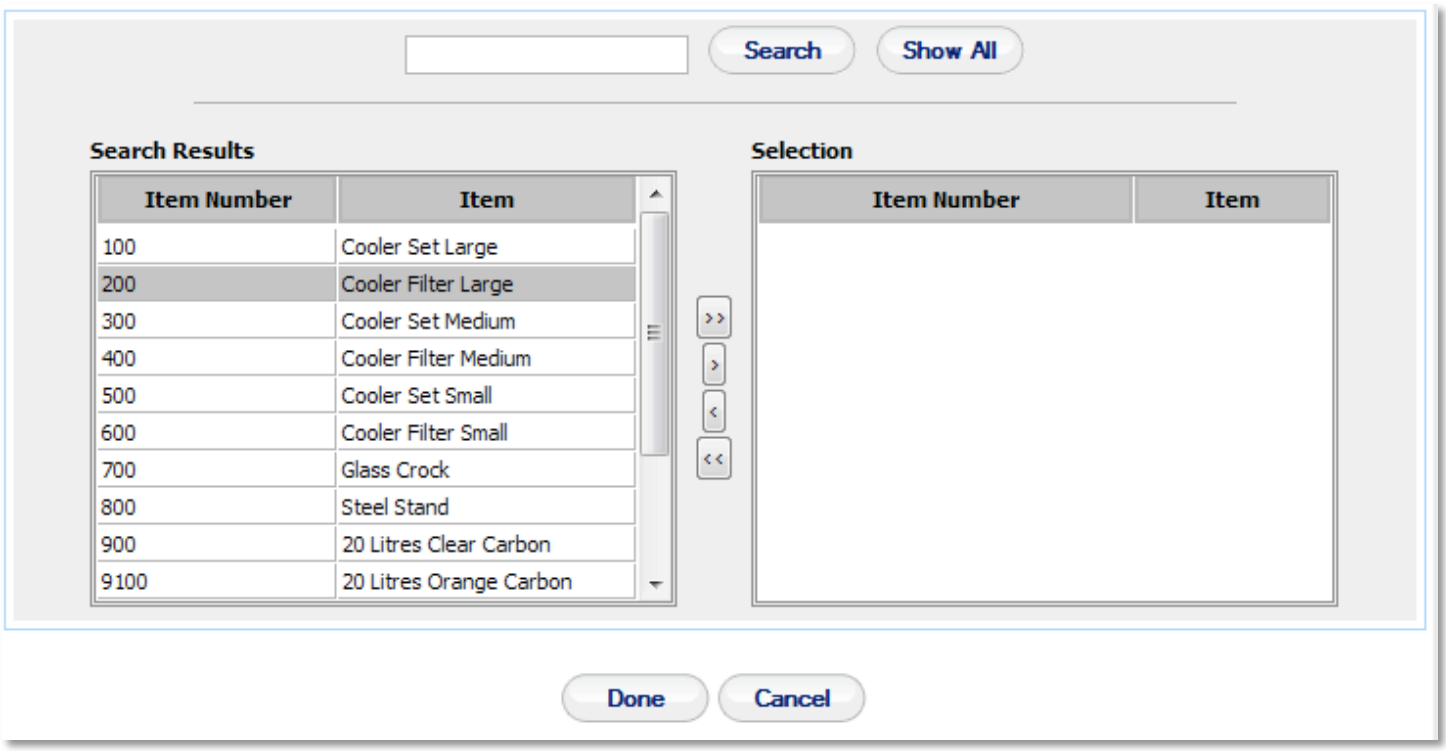


Figure 9

If the search results list contains more that 1000 values, then a paging option is enabled in the filter popup page, as shown in Figure 10. To navigate between the different Search Results pages the user must click the Left/Right paging buttons to move up and down by one page or to go to the first or last page. A message displaying which numbers of rows are currently viewed will be displayed at the top of the filter tables. Note, however, that the filters paging option is not supported by all databases.

Search Results Displaying Rows 1 – 1000

Figure 10

Another option for the case when the search results list contains a large amount of data is to use the search box at the top of the search popup page, as shown in Figures 9 and 10. The user may enter part or all of the value they want into the box and press **'Search'**. For example, typing **'Cooler'** in the search box of Items would result in the following appearing in the **'Search Results'** section: *Cooler Set Large* and *Cooler Filter Large*. To view the full range of values again click the **'Show All'** button. Once the selection has been made, click the **'Done'** button. When the user returns to the filter page they will see the selected values highlighted.

2.7 Add Numeric Filter

By clicking the '**Add a Numeric Filter'** link, as shown in the bottom part of the filters page, Figure 8, another section for filter selection appears, which corresponds to filtering any numeric fields that are relevant to the reports. This section contains a select list with all the source and result numeric fields that are used to generate the reports. Next to it there is a select list of options such as **'>'**, **'>='**, **'='** etc. Finally there is a text box in which the user can enter the value of the filter they wish.

If the between option is chosen from the second list, two text boxes appear, one should hold the first value and the other the second value of the range that the user wishes to see data for. For example, a user can select to view only data with margin between 20% and 35%. In this case only data whose margin value corresponds to this range appear at the report. The user has the option to add more numeric fields by clicking the **'Add Another Link'**. Up to 5 numeric filters can be added for a report generation. If the user wishes to remove any of these filters, they can click the delete icon next to the filter options.

2.8 Choose Report Configuration

The final section of the report wizard is choosing the report configuration, Figure 11. This contains four segments: **'Order By'**, **'Group By'**, **'View By'**, **'Properties'** and **'Customize Look and Feel'**.

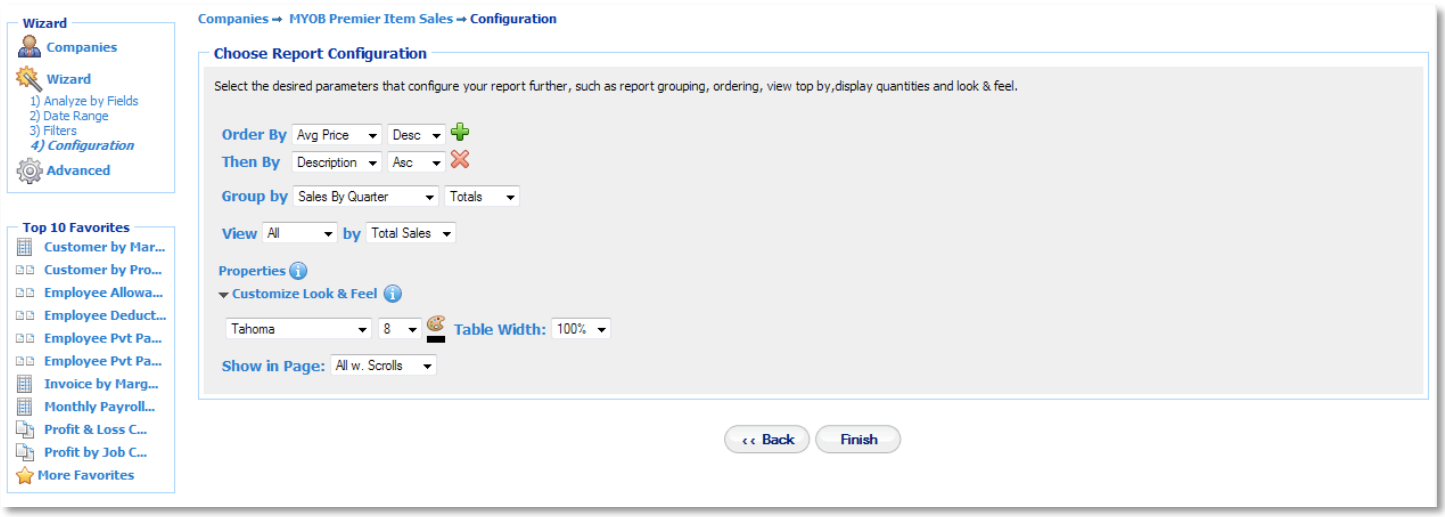


Figure 11

The **'Order By'** option specifies the manner in which a report should be ordered. For example, the sales data for Salesperons can be ordered on Avg Price. When the report is generated the Salespersons will be listed in order of the highest Avg Price. Please note that this does not apply to grouped charts, pivot or comparison charts. The user can have up to 3 **'Order by'** fields, by clicking the plus icon next to the **'Order by'** options. Then a new order by field appears. To remove the extra order by options the user must click the delete icon next to the additional order by field.

The **'Group By'** option selects a variable by which a report is to be grouped. For example, the sales data for Salespersons can be divided into quarterly segments by selecting *Sales by Quarter* from the drop down menu. Also, the way the grouped report data should be displayed can be selected. The data can either be viewed with the group values shown in individual columns by selecting the **'Cols'** option, or with subgroups separated by the group totals by selecting the option **'Totals'**.

The **'View By'** option specifies a selection of data to be visible at a report. The **'View'** list contains several options,

- **All** - to select all the data
- **Top 5-100** - to select the top 5-100 results
- **Bottom 5-100** - to select the bottom 5-100 results

The associate **'By'** field is the value upon which the Top/Bottom option is chosen.

The **'Properties'** link when clicked opens a new window with more options that can be applied to the way the data are displayed, see Figure 12. The user can select how the data should be displayed in the table, horizontally with the labels shown in rows and the data in columns or vertically with the labels in columns and the data in rows. The user can select whether to show/hide the **'Grand Total'** row, or whether they would only like to view only totals by hiding the **'Report Rows'**.

They can select to show/hide the **'Group Subtotals'** in grouped reports. They can select to show/hide the **'Other Row'** when viewing a Top/Bottom report, and select whether to show/hide rows which contain only zeros. And they can select to **'Suppress'** the report headers when printing or exporting to Excel. Clicking the **'Reset to Current'** link will reset the properties selection to whatever choices were present when the properties popup window opened. Clicking the **'Reset to Default'** link will reset the properties to their default values as set in the system preferences on the administration side.

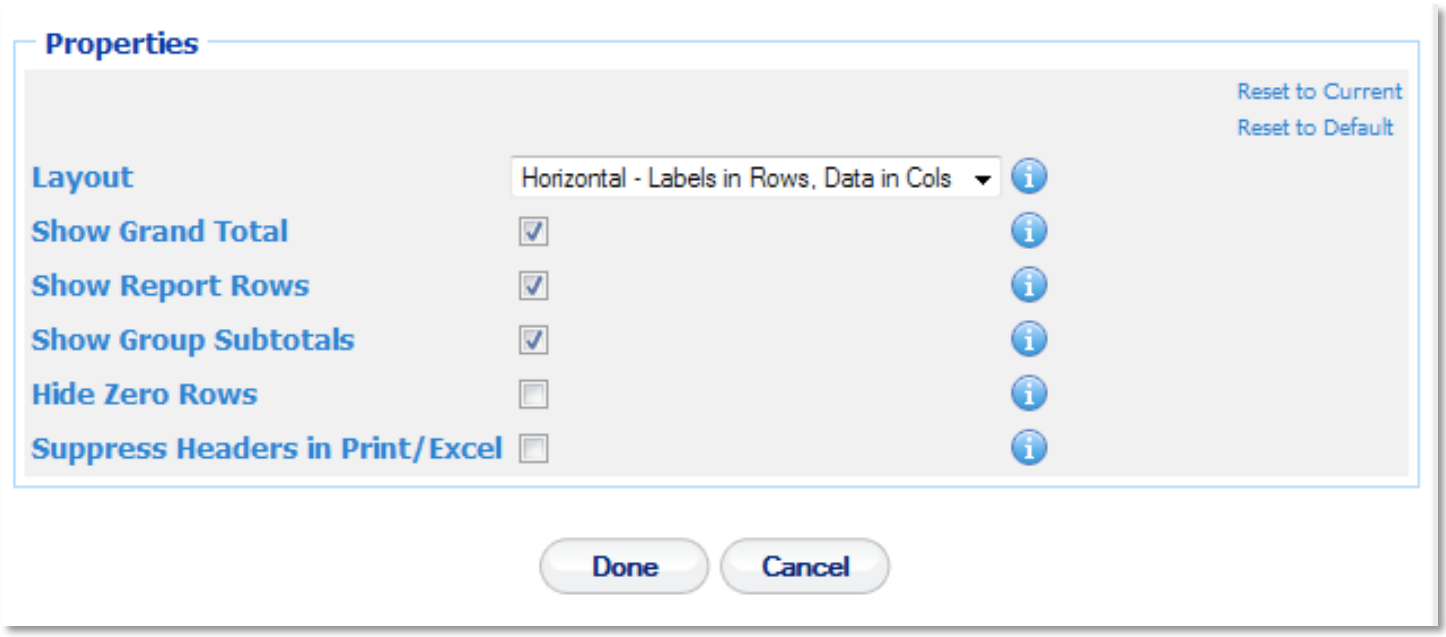


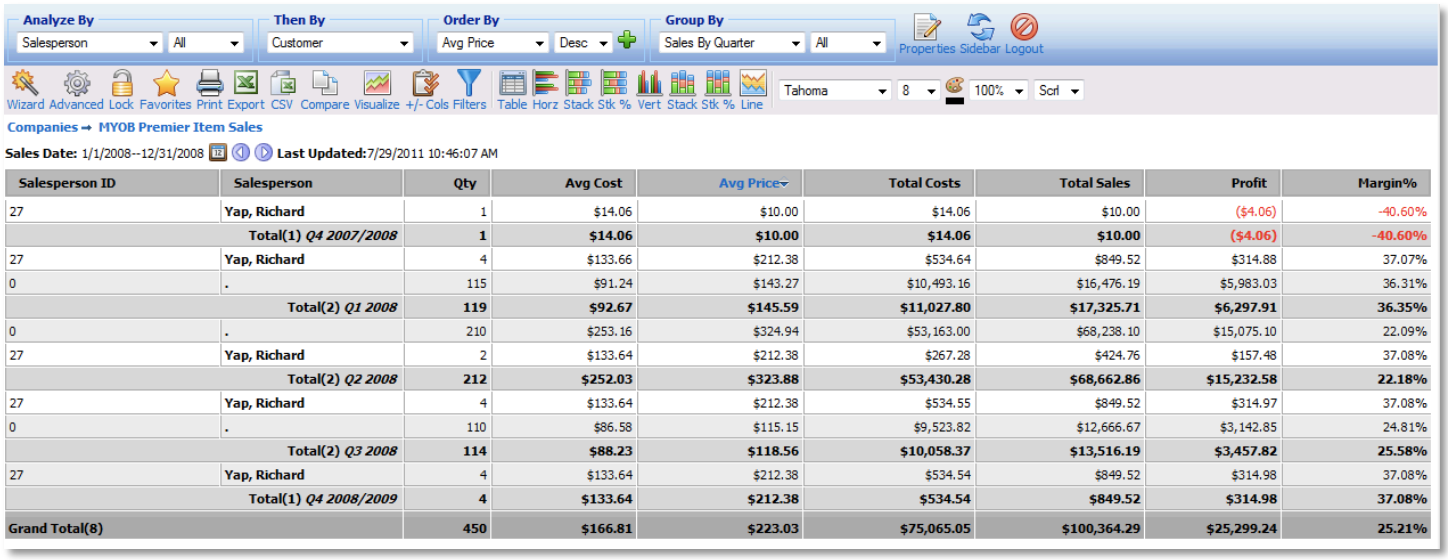
Figure 12

The **'Customize Look and Feel'** link in Figure 11 when clicked, allows the user to format the appearance of the report, by selecting the Font family, the Font size and colour. The width of the table can also be selected. The **'Show in Page'** setting provides a selection of options with respect to how many data should appear on a report page. There are four numeric options, 50, 100, 200 and 500, and two non-numeric options, **'All with scrolling'** and **'All w/o scrolling'**.

The numeric options correspond to how many records will appear at a report page. If the report contains more records than this selection, the remaining ones will be shown at subsequent pages, holding the same amount of data. For example, if a user selects to show 100 results per page, a report that contains 360 records will be shown in 4 pages. If the option **'All with scrolling'** is selected the whole set of data will be shown at a scrollable table within the borders of the browser screen. Otherwise, if the **'All w/o scrolling'** option is chosen the whole range of data will be shown on the browser window, extending as long as it takes without additional scroll bars.

Figure 13 shows the first level of a report after following a set of selections from the wizard pages, as described above. The following settings have been used to generate this example report:

- **Select Report Type:** Standard Report
- **Choose Analysis Report Parameters:** First Examine is set to Salesperson, the top Then drilldown into is set to Customer and the final Then drilldown into is set to Item.
- **Choose Date Ranges:** This was set to Last Year.
- **Filter Data:** All fields in the filter data were set to All.
- **Choose Report Configuration:** Group By was set to Sales by Quarter while Order By was set to Avg. Price.



Salesperson ID	Salesperson	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
27	Yap, Richard	1	$14.06	$10.00	$14.06	$10.00	($4.06)	-40.60%
	Total(1) *Q4 2007/2008*	**1**	**$14.06**	**$10.00**	**$14.06**	**$10.00**	**($4.06)**	**-40.60%**
27	Yap, Richard	4	$133.66	$212.38	$534.64	$849.52	$314.88	37.07%
0	.	115	$91.24	$143.27	$10,493.16	$16,476.19	$5,983.03	36.31%
	Total(2) *Q1 2008*	**119**	**$92.67**	**$145.59**	**$11,027.80**	**$17,325.71**	**$6,297.91**	**36.35%**
0	.	210	$253.16	$324.94	$53,163.00	$68,238.10	$15,075.10	22.09%
27	Yap, Richard	2	$133.64	$212.38	$267.28	$424.76	$157.48	37.08%
	Total(2) *Q2 2008*	**212**	**$252.03**	**$323.88**	**$53,430.28**	**$68,662.86**	**$15,232.58**	**22.18%**
27	Yap, Richard	4	$133.64	$212.38	$534.55	$849.52	$314.97	37.08%
0	.	110	$86.58	$115.15	$9,523.82	$12,666.67	$3,142.85	24.81%
	Total(2) *Q3 2008*	**114**	**$88.23**	**$118.56**	**$10,058.37**	**$13,516.19**	**$3,457.82**	**25.58%**
27	Yap, Richard	4	$133.64	$212.38	$534.54	$849.52	$314.98	37.08%
	Total(1) *Q4 2008/2009*	**4**	**$133.64**	**$212.38**	**$534.54**	**$849.52**	**$314.98**	**37.08%**
Grand Total(8)		**450**	**$166.81**	**$223.03**	**$75,065.05**	**$100,364.29**	**$25,299.24**	**25.21%**

Figure 13

2.9 Chart Report

The generation of a Chart report is very similar to that of a Standard report with only two variations. The first is the extra wizard **'Choose Chart Format'** page that allows the user to select the type of chart they wish the data to be displayed, as shown in Figure 14. This page appears after selecting the **'Chart'** option from the **'Choose Analysis Report Parameters'** page, Figure 6, and contains four charting types. The user simply clicks the chart type they wish for their report display.

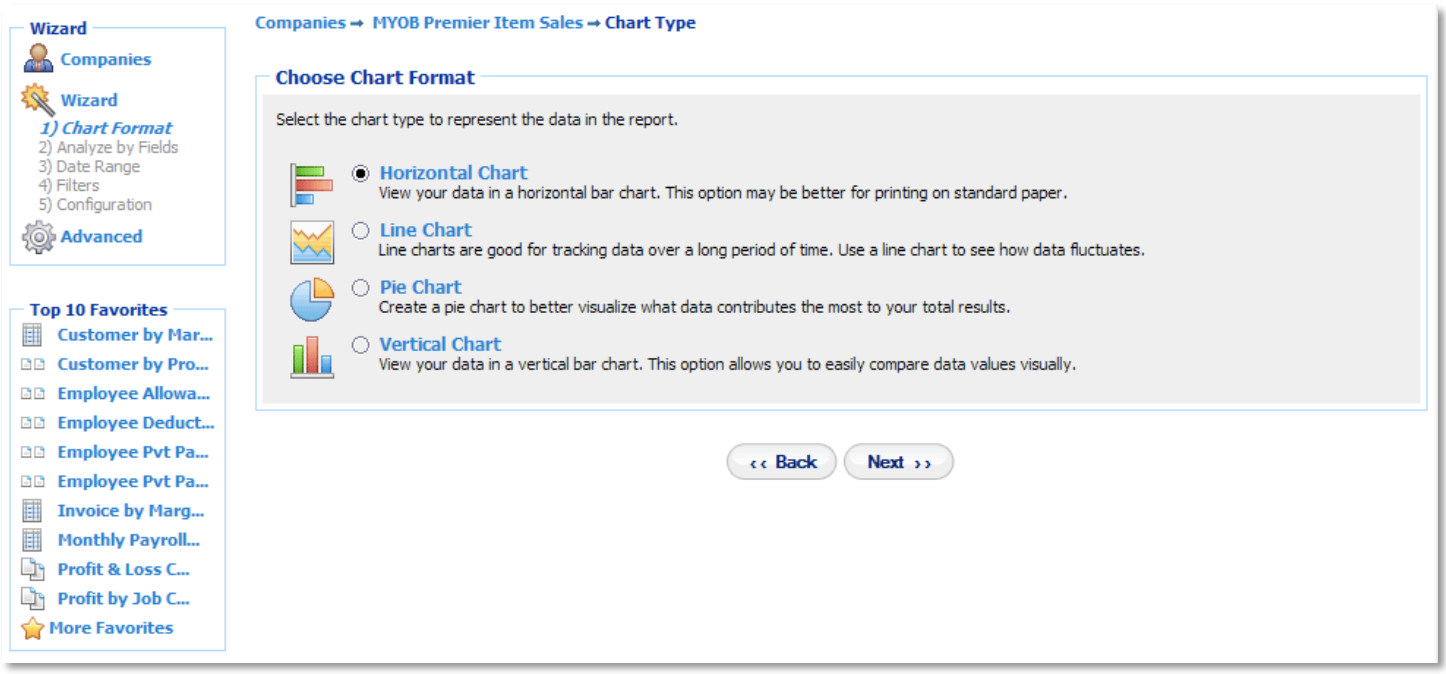

Wizard
Companies
Wizard
1) Chart Format
2) Analyze by Fields
3) Date Range
4) Filters
5) Configuration
Advanced
Top 10 Favorites
Customer by Mar...
Customer by Pro...
Employee Allowa...
Employee Deduct...
Employee Pvt Pa...
Employee Pvt Pa...
Invoice by Marg...
Monthly Payroll...
Profit & Loss C...
Profit by Job C...
More Favorites
Companies ➡ MYOB Premier Item Sales ➡ Chart Type
Choose Chart Format
Select the chart type to represent the data in the report.
Horizontal Chart
View your data in a horizontal bar chart. This option may be better for printing on standard paper.
Line Chart
Line charts are good for tracking data over a long period of time. Use a line chart to see how data fluctuates.
Pie Chart
Create a pie chart to better visualize what data contributes the most to your total results.
Vertical Chart
View your data in a vertical bar chart. This option allows you to easily compare data values visually.
‹‹ Back
Next ››

Figure 14

The second variation appears at the **'Choose Report Configuration'** page, and it is mainly the existence of an extra criterion for selecting the **'Chart Quantity'**, see Figure 15. This sets the value they wish the data to reflect in their chosen chart. Again the user simply clicks on the desired option to make their selection.

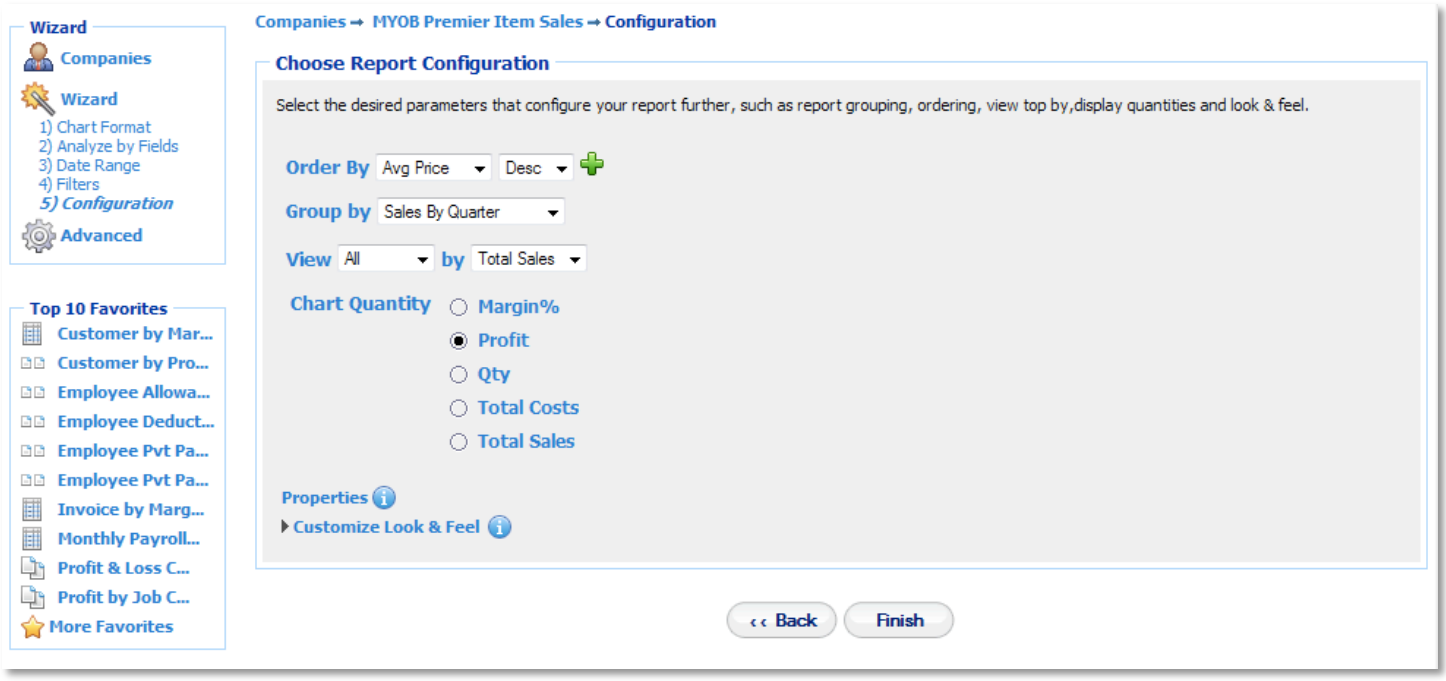


Figure 15

When generating chart reports the **'Properties'** window displays a different set of properties, as shown in Figures 16 and 17. Note that different types of chart reports will have a different set of properties, for example Figure 16 shows the properties associated with a Pie chart, and Figure 17 those associated with a Horizontal or Vertical chart. These sets of properties can greatly enhance the performance of chart reports, as they can allow the user to set the Look & Feel of charts, assign **'Constant'** and **'Average'** lines, adjust **'Min'** and **'Max'** values of the axes and many more. A list of all the chart properties with their description is shown in the Administration Manual.

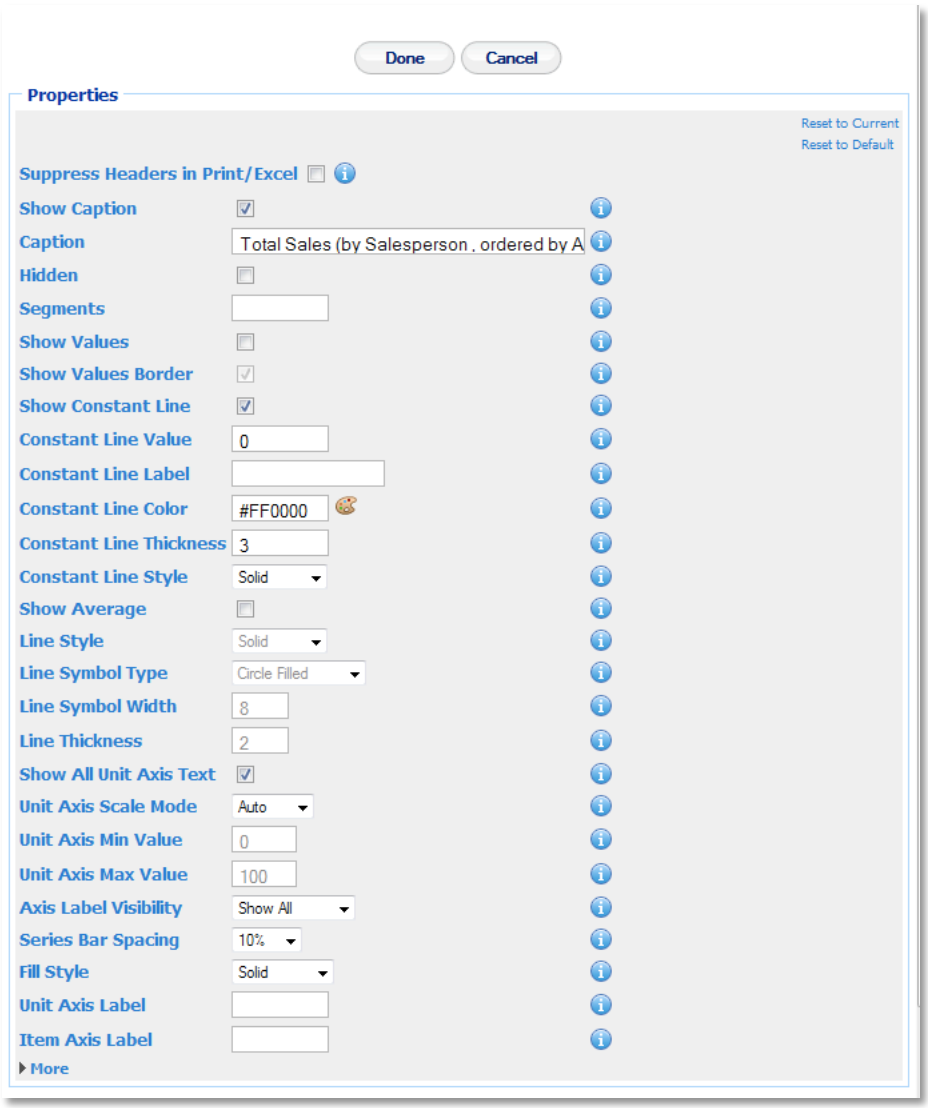


Figure 16

 © Interactive Reporting

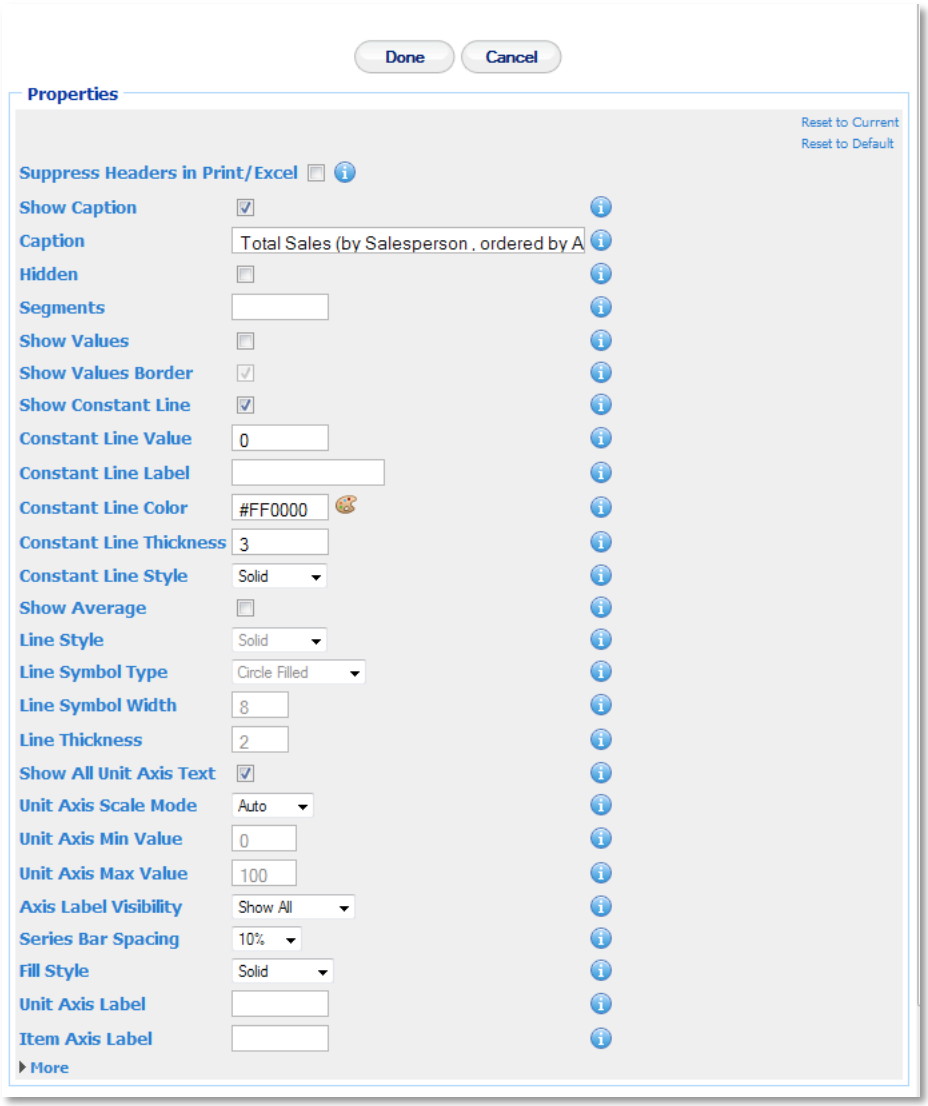


Figure 17

 © Interactive Reporting

Figure 18 shows a Pie chart report with the Chart quantity set to *Profit*.

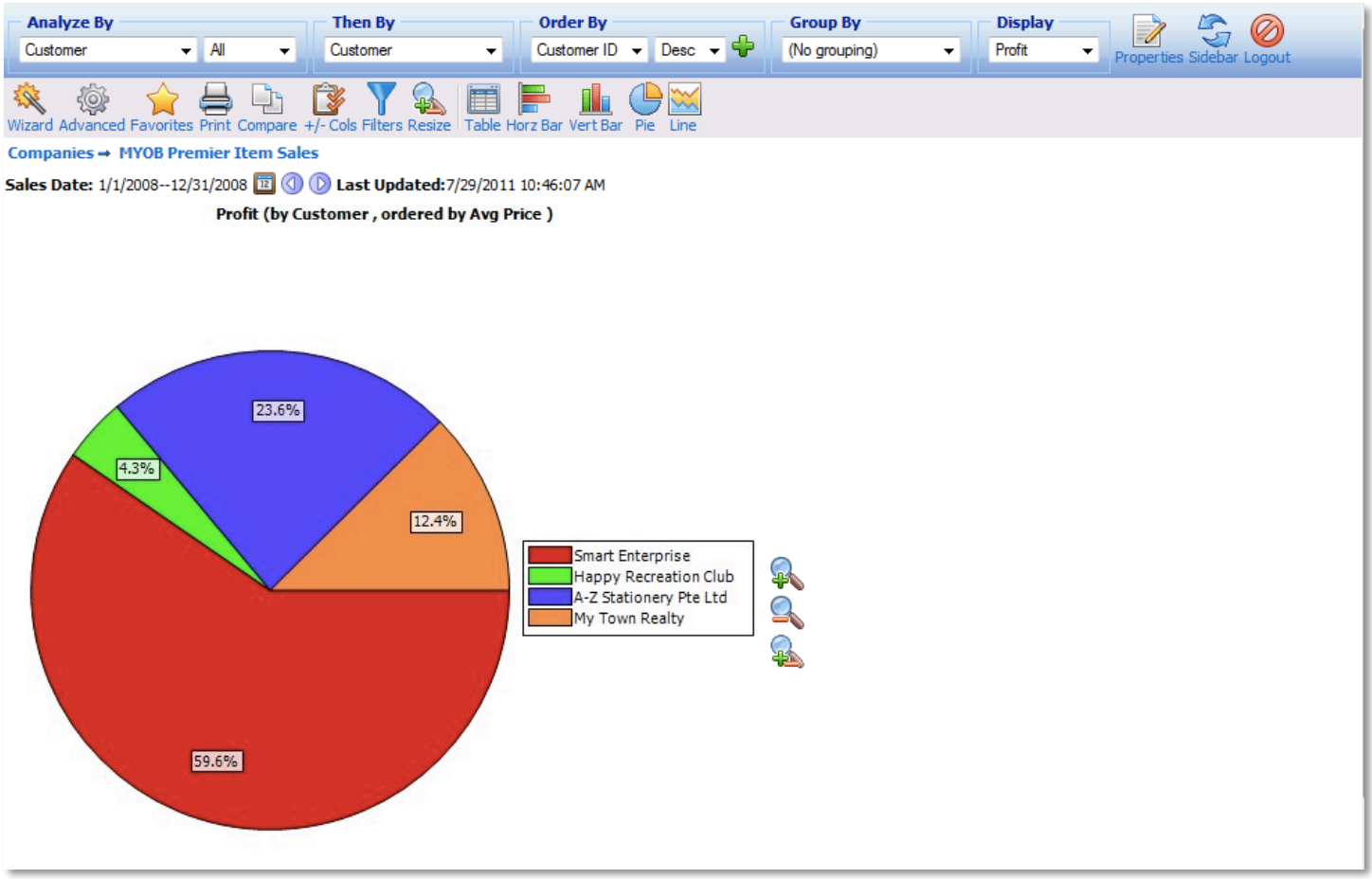


Figure 18

 © Interactive Reporting

2.11 Pivot Report

A Pivot Report allows the user to compare two sets of data against one another. This differs from a comparison report where the same set of data is compared over different time periods. To generate a Pivot report the user must first select the **'Pivot'** option in the **'Choose Analysis Report Parameters'** page, Figure 6. In the second page of the wizard for generating Pivot Reports, Figure 23, the user must decide on the layout for the report, which value shall be displayed along the horizontal and which along the vertical direction. The **'Then drilldown into'** option determines the second level of report after a report value is clicked. For example, if the **'Then drilldown into'** value is set to *Items*, when clicking on the Salesperson in the pivot report, all *Items* for the Salesperson will be displayed.

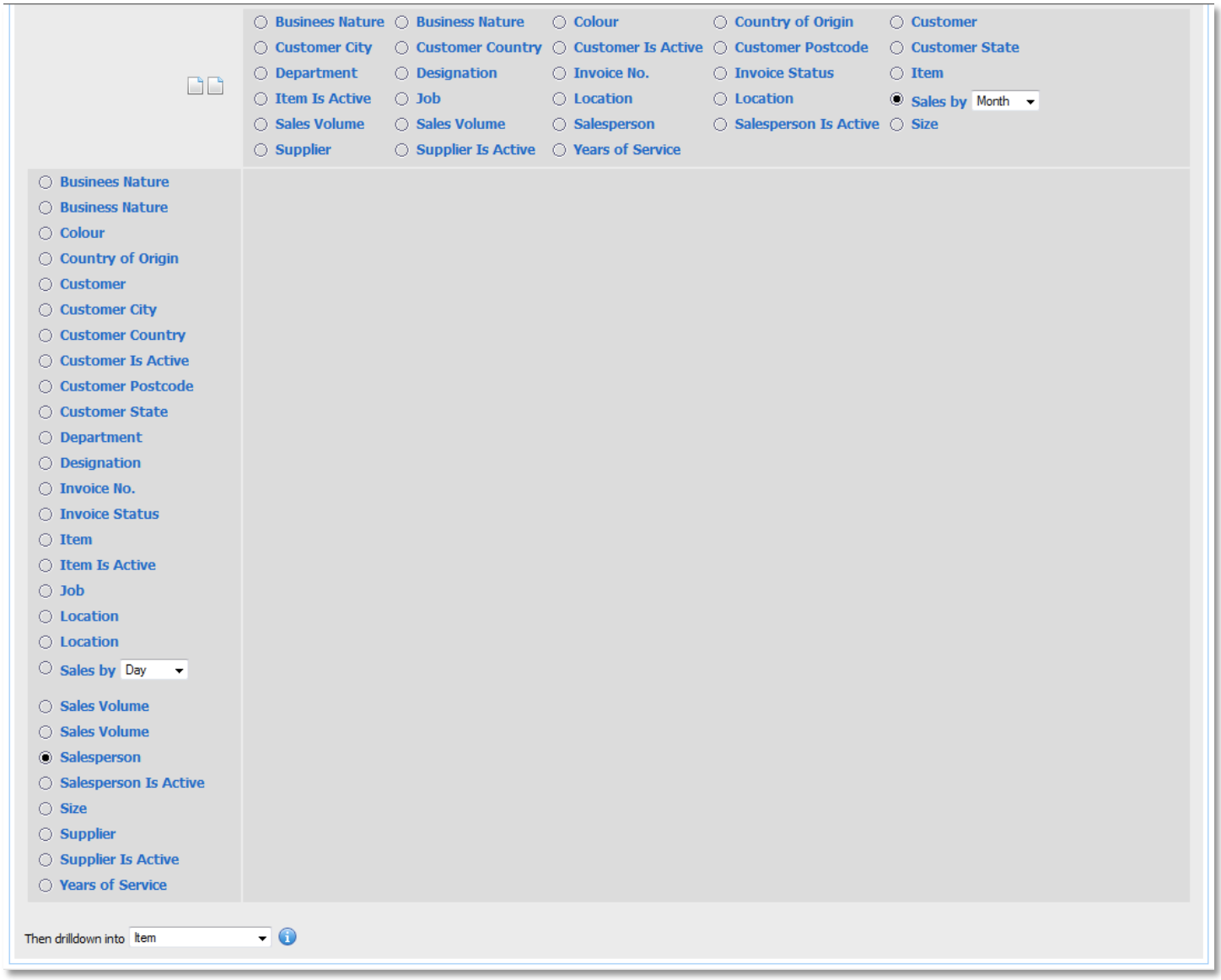


Figure 19

In a similar fashion to the Chart reports, the **'Choose Report Configuration'** page differs from that of the Standard report, in that it contains the option to select for which quantity to view the pivot report, Figure 24. The extra options **'All (H)'** and **'All (V)'** allow the pivot report to be performed on all quantities that are contained in the **'Pivots Quantity'** list. The former option will display each pivot quantity in a separate column, whereas the latter will show all pivot quantities within the same table cell.

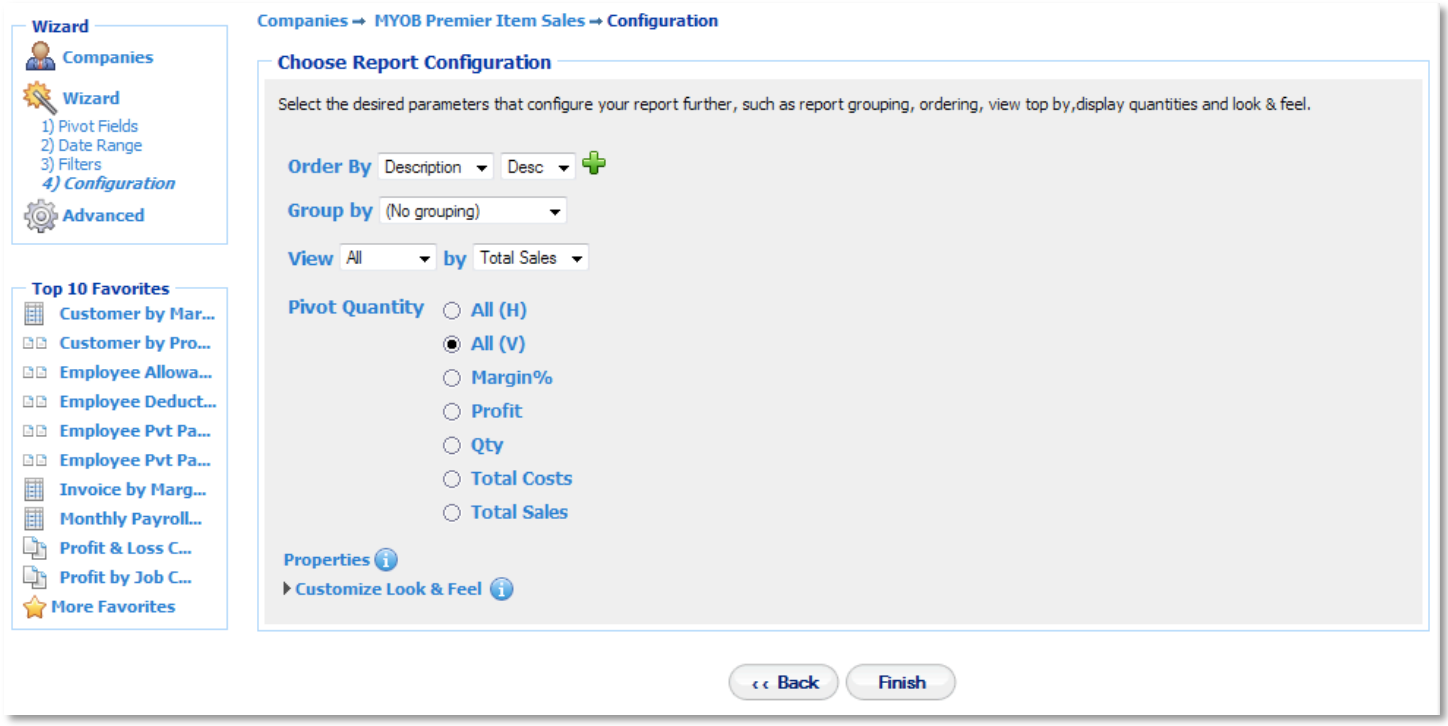
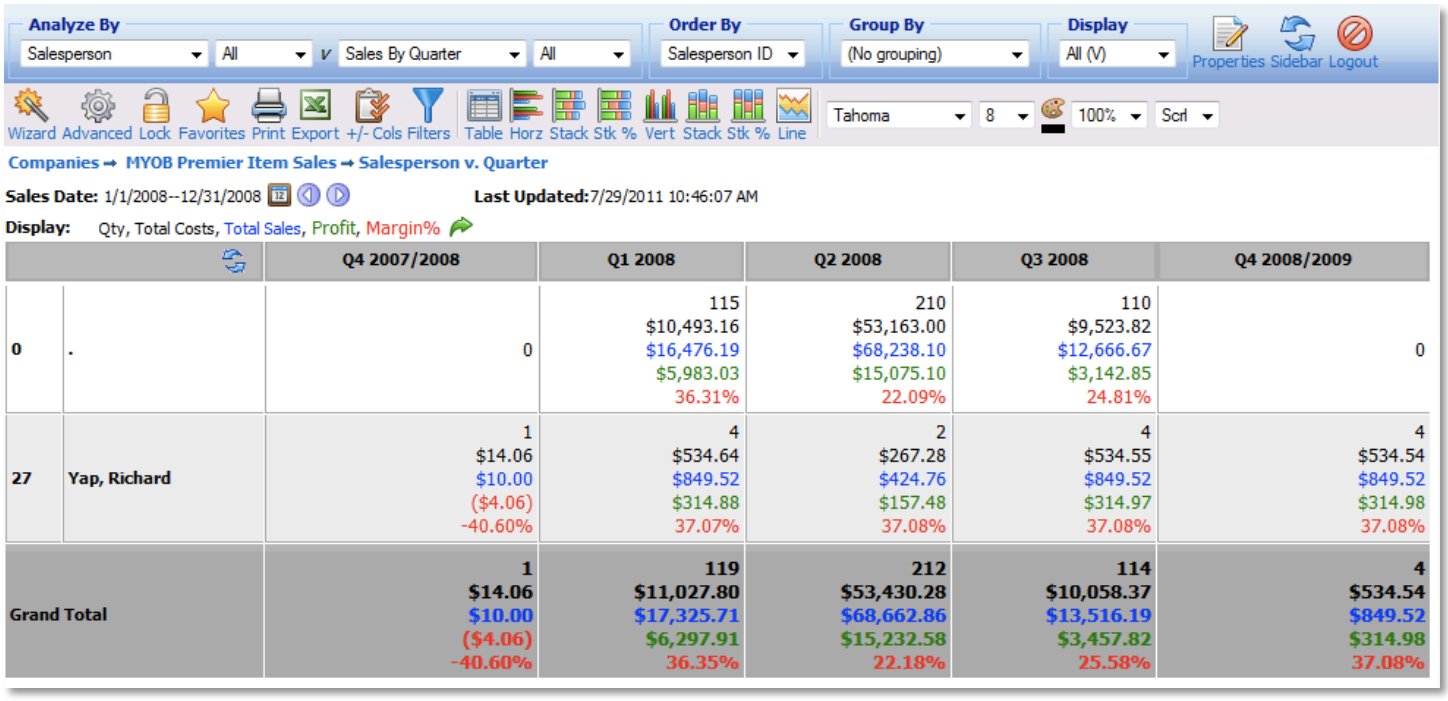


Figure 20

Figure 25, shows a pivot report for *Sales Rep* vs *Sales by Quarter* with all the pivot quantities shown at the report.


Analyze By
Salesperson All v Sales By Quarter All
Order By
Salesperson ID
Group By
(No grouping)
Display
All (V)
Properties Sidebar Logout
Wizard Advanced Lock Favorites Print Export +/- Cols Filters Table Horz Stack Stk % Vert Stack Stk % Line
Tahoma 8 100% Scrl
Companies ➡ MYOB Premier Item Sales ➡ Salesperson v. Quarter
Sales Date: 1/1/2008--12/31/2008
Last Updated: 7/29/2011 10:46:07 AM
Display: Qty, Total Costs, Total Sales, Profit, Margin%

		Q4 2007/2008	Q1 2008	Q2 2008	Q3 2008	Q4 2008/2009
0	.	0	115 $10,493.16 $16,476.19 $5,983.03 36.31%	210 $53,163.00 $68,238.10 $15,075.10 22.09%	110 $9,523.82 $12,666.67 $3,142.85 24.81%	0
27	Yap, Richard	1 $14.06 $10.00 ($4.06) -40.60%	4 $534.64 $849.52 $314.88 37.07%	2 $267.28 $424.76 $157.48 37.08%	4 $534.55 $849.52 $314.97 37.08%	4 $534.54 $849.52 $314.98 37.08%
Grand Total		**1 $14.06 $10.00 ($4.06) -40.60%**	**119 $11,027.80 $17,325.71 $6,297.91 36.35%**	**212 $53,430.28 $68,662.86 $15,232.58 22.18%**	**114 $10,058.37 $13,516.19 $3,457.82 25.58%**	**4 $534.54 $849.52 $314.98 37.08%**

Figure 21

2.12 Comparison Report

The Comparison Report is the final report wizard option. This report allows the user to compare data over two (or four) date ranges. To generate a comparison report the user selects the **'Comparison'** option from the **'Choose Analysis Report Parameters'** page, Figure 6. The user then follows the same set-up format as the standard report with one difference. The **'Choose Date Range'** page of Standard report has been replaced by the **'Choose Comparison'** page, as can be seen in Figure 26. Here the user is provided with a number of options. First, the user must select the date type for which they wish to create the comparison report. Some reports may offer more than one type of date, e.g. invoice dates, sales date and delivery dates, which can be selected from the **'Compare'** list. Second, the user must decide whether they want to compare two or four date ranges. To compare data over four date ranges, the user must click on the **'Advanced'** link. The display will change to that of Figure 27. Once the date type and the complexity levels have been decided the user must then enter the desired date ranges. This can be done in exactly the same way as it was described in the date range selection of standard reports, Figure 7.

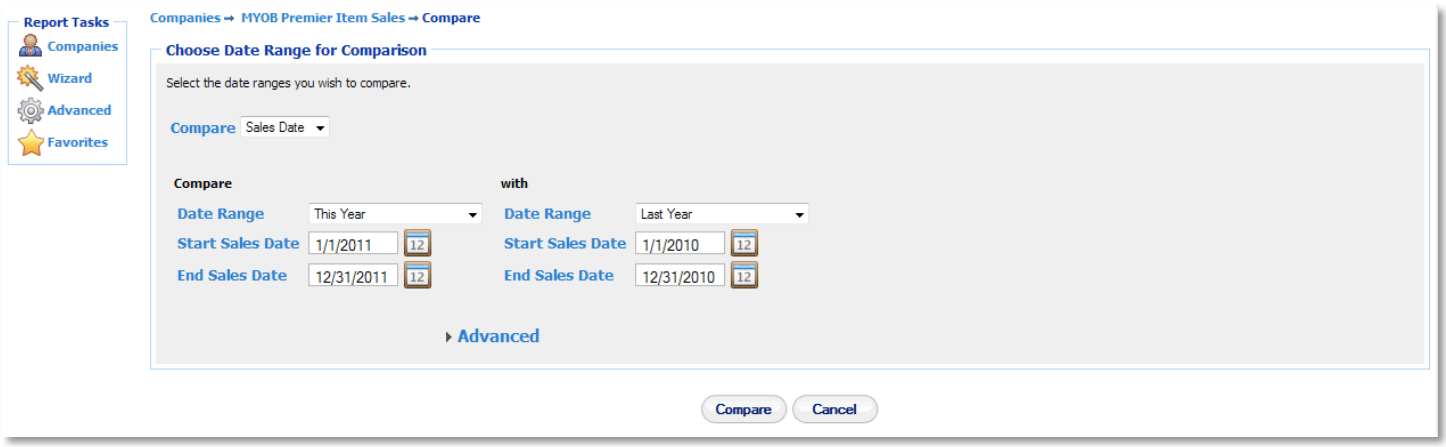


Figure 22

 © Interactive Reporting

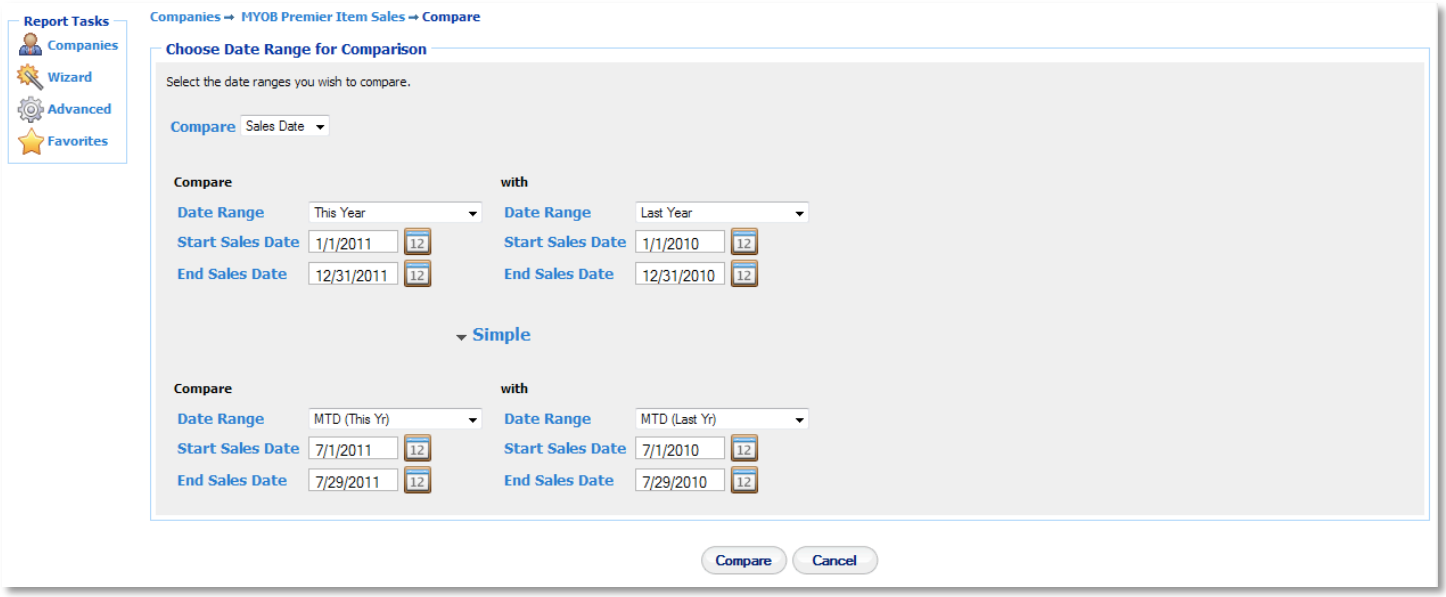


Figure 23

An example of a comparison report is presented in Figure 28. The following report compares the sales figures from each Salesperson between the first and second quarter.

Analyze By Salesperson All
Then By Customer
Order By Salesperson Asc
Group By (No grouping)
Var. Var
Properties Sidebar Logout
Wizard Advanced Lock Favorites Print Export Compare +/- Cols Filters Table Horz Stack Stk % Vert Stack Stk % Line H Var V Var L Var
Tahoma 8 100% Scrl
Companies ➞ MYOB Premier Item Sales ➞ Salesperson Comparison
Sales Date: 1/1/2009 -- 3/31/2009 v 10/1/2008 -- 12/31/2008 Last Updated: 7/29/2011 11:30:20 AM

		1/1/2009 -- 3/31/2009					10/1/2008 -- 12/31/2008								
Salesperson ID	Salesperson	Qty	Total Costs	Total Sales	Profit	Margin%	Qty	Total Costs	Total Sales	Profit	Margin%	Qty Var.	Total Costs Var.	Total Sales Var.	Pr
22	Lee, Joshua	1	$133.62	$208.41	$74.79	35.89%	0	$0.00	$0.00	$0.00	0.00%	1	$133.62	$208.41	
27	Yap, Richard	3	$343.42	$500.89	$157.47	31.44%	6	$801.81	$1,274.28	$472.47	37.08%	-3	($458.39)	($773.39)	
Grand Total (2)		4	$477.04	$709.30	$232.26	32.74%	6	$801.81	$1,274.28	$472.47	37.08%	-2	($324.77)	($564.98)	

Figure 24

2.13 Advanced Reporting

The **'Advanced Reporting'** option directs the user to the advanced reporting interface for generating reports. This option refers mainly to users that have greatly familiarized themselves with BIforMYOB and can create their reports from a more compact page than the simple wizard pages. The Advanced Reporting tool is explained in more detail in Chapter 4.

2.14 View Favorites

The **'View Favorites'** option directs the user to a list of predefined reports, as shown in Figure 29. The list contains all previously saved reports that the user has generated. Any favorite reports that other users have created can also be shown, if they have given access to their favorites to be shared with the current user, for example the favorite *Top Selling Reps* of Figure 29. The current user may choose not to view any shared favorites by clicking on the **'Hide Shared'** Link at the top of the Favorites List. When a favorite report is scheduled for emails, a mail icon appears next to the favorite's title. By clicking the **'Edit'** icon the user can modify the favorite's options. The current user cannot edit and/or delete any shared favorites from other users. The favorite reports are being displayed according to the categories that have been created, which are listed on the left-hand-side panel called **'Category'**. To view which favorite reports belong to each category, the user must click on the category's name. Those saved reports that belong to no category appear in the **'Main'** option of the list.

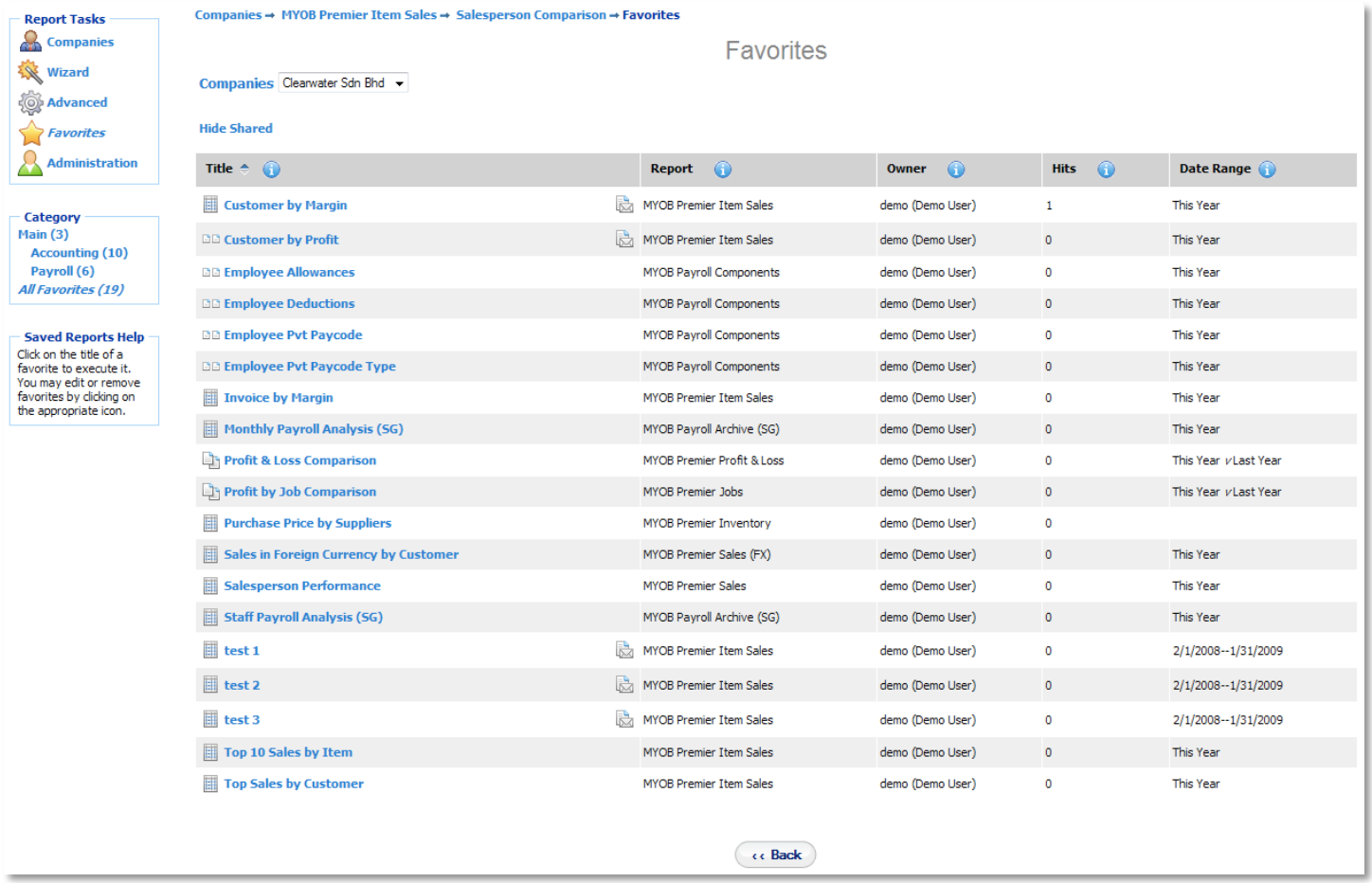

Report Tasks
Companies
Wizard
Advanced
Favorites
Administration
Category
Main (3)
Accounting (10)
Payroll (6)
All Favorites (19)
Saved Reports Help
Click on the title of a favorite to execute it. You may edit or remove favorites by clicking on the appropriate icon.
Companies ➞ MYOB Premier Item Sales ➞ Salesperson Comparison ➞ Favorites
Favorites
Companies Clearwater Sdn Bhd
Hide Shared
Title
Report
Owner
Hits
Date Range
Customer by Margin MYOB Premier Item Sales demo (Demo User) 1 This Year
Customer by Profit MYOB Premier Item Sales demo (Demo User) 0 This Year
Employee Allowances MYOB Payroll Components demo (Demo User) 0 This Year
Employee Deductions MYOB Payroll Components demo (Demo User) 0 This Year
Employee Pvt Paycode MYOB Payroll Components demo (Demo User) 0 This Year
Employee Pvt Paycode Type MYOB Payroll Components demo (Demo User) 0 This Year
Invoice by Margin MYOB Premier Item Sales demo (Demo User) 0 This Year
Monthly Payroll Analysis (SG) MYOB Payroll Archive (SG) demo (Demo User) 0 This Year
Profit & Loss Comparison MYOB Premier Profit & Loss demo (Demo User) 0 This Year vLast Year
Profit by Job Comparison MYOB Premier Jobs demo (Demo User) 0 This Year vLast Year
Purchase Price by Suppliers MYOB Premier Inventory demo (Demo User) 0
Sales in Foreign Currency by Customer MYOB Premier Sales (FX) demo (Demo User) 0 This Year
Salesperson Performance MYOB Premier Sales demo (Demo User) 0 This Year
Staff Payroll Analysis (SG) MYOB Payroll Archive (SG) demo (Demo User) 0 This Year
test 1 MYOB Premier Item Sales demo (Demo User) 0 2/1/2008--1/31/2009
test 2 MYOB Premier Item Sales demo (Demo User) 0 2/1/2008--1/31/2009
test 3 MYOB Premier Item Sales demo (Demo User) 0 2/1/2008--1/31/2009
Top 10 Sales by Item MYOB Premier Item Sales demo (Demo User) 0 This Year
Top Sales by Customer MYOB Premier Item Sales demo (Demo User) 0 This Year
‹‹ Back

Figure 25

When clicking on the **'Edit'** icon the user is directed to a screen as the one shown in Figure 30. When on this page, the user can change the title of the favorite report, schedule it for emails, share the favorite with other user(s) and/or groups, modify its definitions and apply some deeplinking. To schedule emails to be sent to specific email addresses the **'Schedule Email'** checkbox must be clicked, and the page changes to the one shown in Figure 31. The user can select how frequently they wish the favorite to be emailed, which can be daily, weekly and which days of the week, monthly and which day of the month. The email address should be typed at the provided text box, with multiple recipients addresses separated by commas. To share a favorite with any other user or groups of users, the user must click the **'Share Favorite'** link to see a screen like that of Figure 32. To select the users to share the favorite with, highlight the users of choice and use the appropriate buttons to move them to the **'Shared with'** box (multiple and single selections are permitted), or double click on the choices of interest. To modify the favorites definitions the user must click the **'Modify Favorite Definitions'** link, which directs to an advanced interface page. That page allows the user to change any of the reports variables they wish, such as first, second, etc. levels of drilldown, date ranges, type of report and many more. To apply some deeplinking functionality to the favorite, so that the user can link to BIforMYOB from an external page, and provide the required report parameters to be replaced by external values (optional), the user must click on the **'Link'** link to see a screen like that of Figure 33.

By clicking the **'Save'** button the new settings are saved for the favorite and the user is redirected to the **'Favorites'** page.

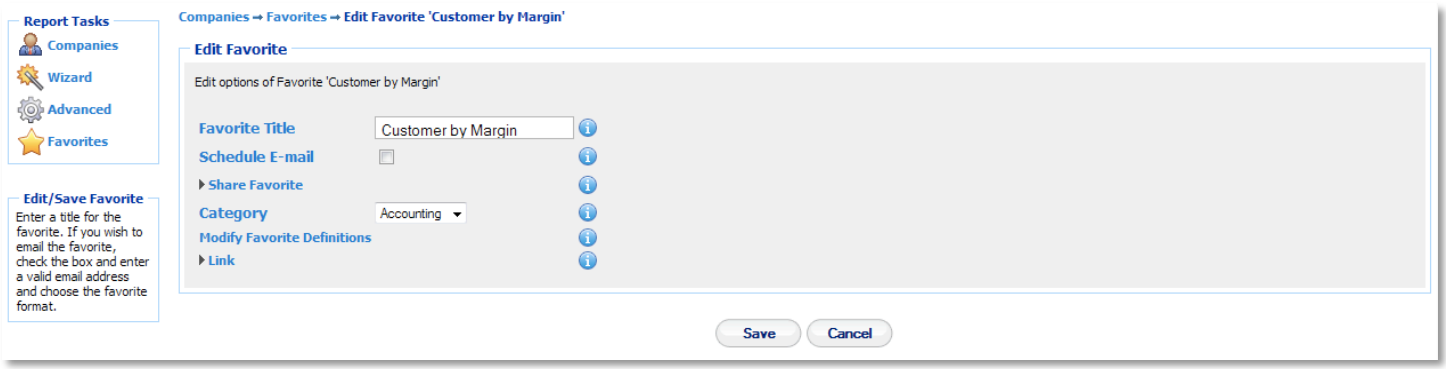


Figure 26

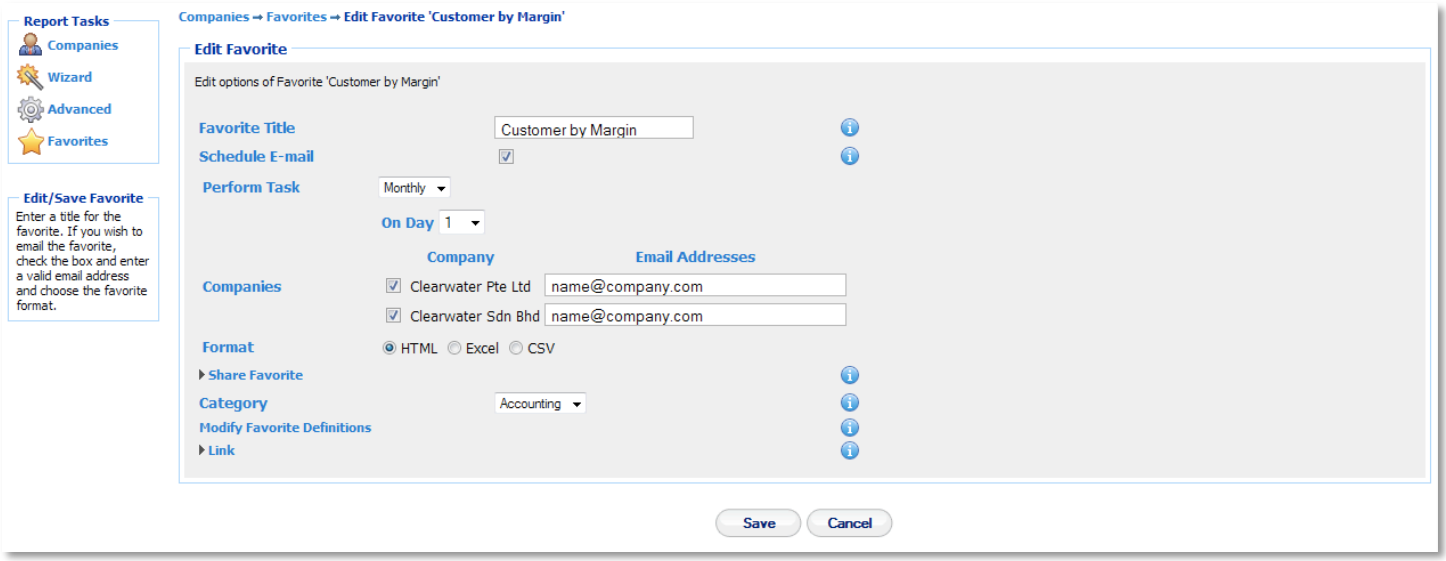


Figure 27

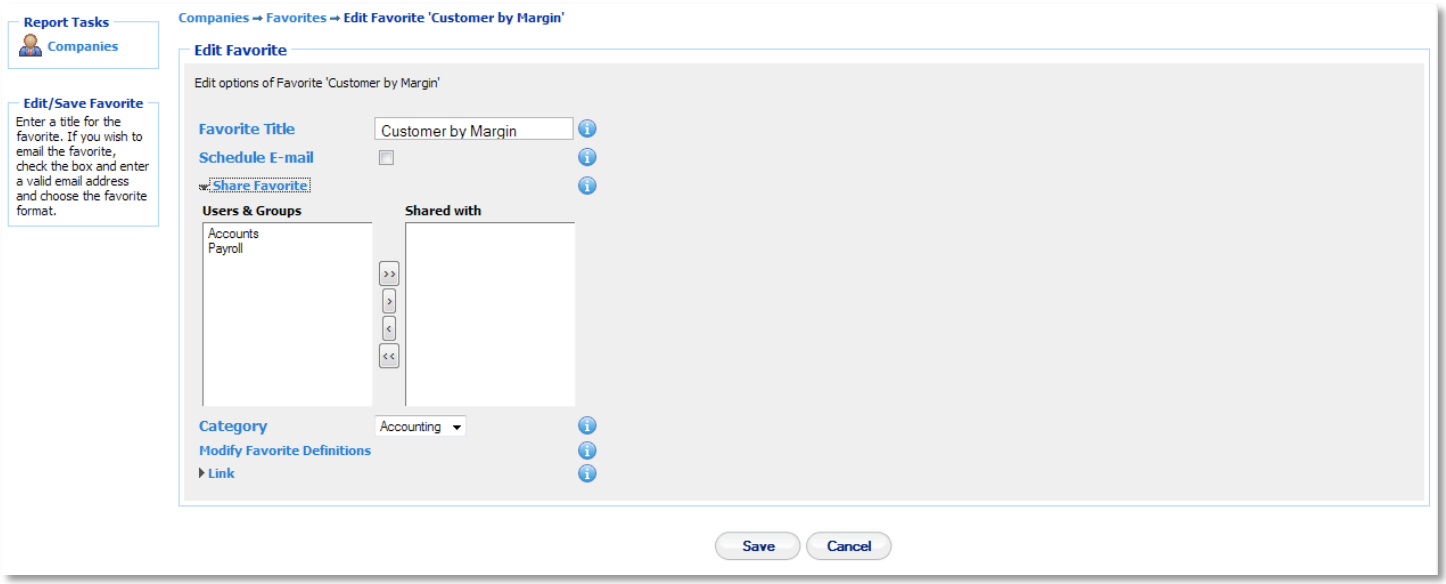


Figure 28

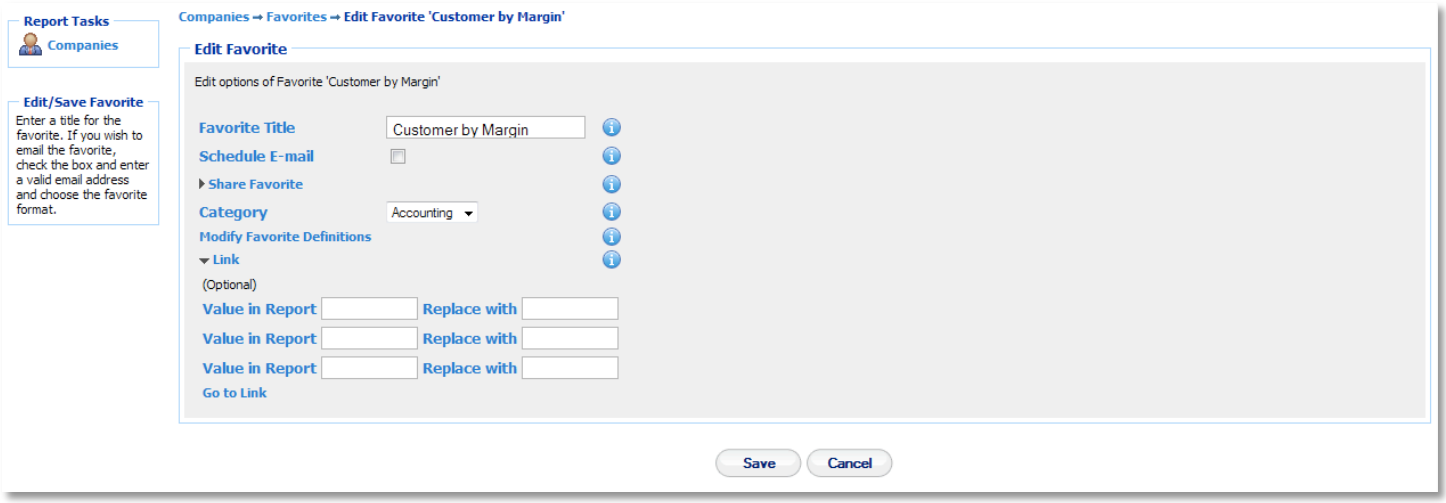

Report Tasks
Companies
Edit/Save Favorite
Enter a title for the favorite. If you wish to email the favorite, check the box and enter a valid email address and choose the favorite format.
Companies ➟ Favorites ➟ Edit Favorite 'Customer by Margin'
Edit Favorite
Edit options of Favorite 'Customer by Margin'
Favorite Title
Customer by Margin
Schedule E-mail
Share Favorite
Category
Accounting
Modify Favorite Definitions
Link
(Optional)
Value in Report
Replace with
Value in Report
Replace with
Value in Report
Replace with
Go to Link
Save
Cancel

Figure 29

Chapter 3 - Generating Advanced Reports

Putting BIforMYOB to Work…

BIforMYOB provides a more advanced but easy-to-use interface to your company's performance data. It provides a point-and-click means of specifying the sales data you wish to analyse. The initial screen varies according to how many reports are available to the user. If there is more than one report, after login the user will be directed to the screen displayed in Figure 2. To generate an advanced report the user must click the **'Advanced'** link next to the name of the desired report. If there is only one report available to the user, the initial screen that is displayed can be seen in Figure 5. To generate an advanced report the user simply clicks the **'Advanced'** link and they will automatically be directed to the advanced screen. The **'Advanced'** page, Figure 37, is a culmination of all options available to the user in the wizard report-generating tool. Once all the parameters of the report have been set, such as the variable by which to analyse, the ordering of the data, the filters to restrict the data the report will analyse, the report can be generated in an instant by pressing the **'Go'** button (either at the top or at the bottom of the page).

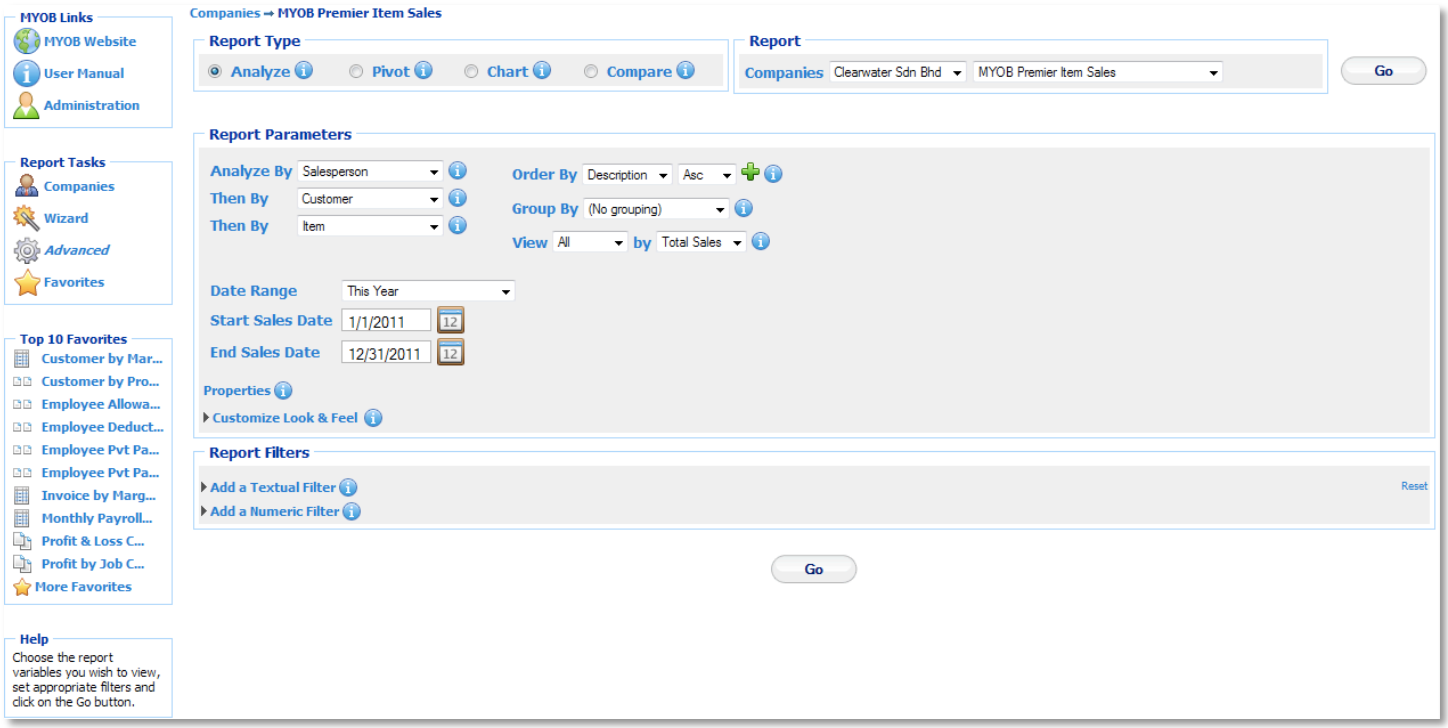


Figure 30

3.1 Report Types

There are five available types of reports. The user can select the report type they wish to view by selecting one of the radio button options of the **'Report Type'** section of the page.

- **'Analyze'** – a standard (one-dimensional) report, which may be grouped and is suitable for producing simple tables.
- **'Pivot'** – a two-dimensional report which provides a table of results – a user may choose to display a number of quantities such as Margin, Profit, Total Sales or a combined report with all the pivot quantities.
- **'Chart'** – a one-dimensional report, containing the desired quantity, e.g. quantity, margin, in the form of a horizontal/vertical bar, pie or line chart. Grouping by a certain variable results in a grouped or stacked chart.
- **'Compare'** – allows the user to compare data across different time periods.

3.2 Report Selection

The **'Report'** select list that appears at the top of the advanced page, allows the user to select a different report. The select list contains the same reports that appear at the **'Choose Report'** page, Figure 2, when logging in. If the user has access to only one report, the **'Report'** selection list will contain only that report. By changing the report, the user is directed to the advanced page specific to the new report.

3.3 Report Parameters

The **'Report Parameters'** section allows the user to select the specific information they wish to see at the report, and to select how to format the report.

3.4 Report Variables

The report variables are the fields by which the user wishes to analyse their data. They may specify the following (using the drop-down list boxes):

- **'Analyze By'** – the main variable for which to display data. In the example above, it is Sales Reps. If an analysis is performed the first level of the report will display the Sales Reps data.
- **'Then By'** – the variable by which the user wishes to perform further analysis when going to secondary levels of the report. In the example above there are two 'Then By' options, Customer and Categories. Let's assume that an analysis report is generated for Sales Reps.. If a particular sales representative is selected, the customers of this sales representative are then displayed. If a particular customer is selected, the report will show all the categories used by this customer for the specific Sales Rep.

3.5 Report Ordering – Order By

This indicates how to sort the results of the report. Choices may consist of **'Description'** which sorts data alphabetically by description, **'Code'** which sorts data by alphanumeric code, a list of numeric quantities that appear at the report, e.g. Margin, Avg Cost, Total Sales etc., which sort the data numerically. Depending on how the system administrator has configured the system, the 'Order by' list may differ. The user can have up to 3 order by fields, as described in section 2.8.

3.6 Report Grouping – Group By

This optional setting indicates whether and how the user wishes to have the results of the report grouped. The user may select **'No Grouping'** or specify a particular quantity by which to group. The latter option provides a breakdown according to the grouping specified. The user can also select whether they wish to view the group values at separate columns in the table or view the group subtotals.

3.7 Quantity of Data Displayed – View By

The **'View'** option lets the user choose how much of the data should be displayed. It consists of five values:

- **All**: all the resulting data are shown.
- **Top 5-100**: displays the Top 5-100 values in the resulting report, sorted by the value selected from the select list next to the **'By'** option. For example, an analysis by customers with Top 20 by Total Sales results in the twenty customers with the highest total sales.
- **Bottom 5-100**: displays the Bottom 5-100 values in the resulting report.

3.8 Report Dates

The next set of options provides the date range from which the data will be extracted. The user can select a predetermined date range that may be chosen from the drop down menu of 'Date Range'. These include: Last Year, YTD (Year to Date), Last Quarter, Yesterday and many more. If the user would prefer to enter their own specific date range then there are two options available to them. The first is to type the initial and final dates into the **'Start Sales Date'** and **'End Sales Date'** fields, respectively. The second option is to click on the calendar next to each date box and select the dates from there.

3.9 Properties

The user can customise the reports further by selecting to show/hide specific rows, and/or select the table layouts.

3.10 Customise Look and Feel

If the user wishes to customize the way their reports look, they can click the **'Customize Look and Feel'** link to reveal the options that format the appearance of the report, by selecting the Font family, the Font size and colour, as well as the table width. The **'Show in Page'** setting provides a selection of options with respect to how many data should appear on a report page or whether the results should appear within a scrollable table or not.

3.11 Report Filters

When generating reports, it is often desirable to restrict the analysed data to just a subset of what is available. Perhaps you are only interested in a particular category of goods, or the revenue generated by an individual member of the sales team. BIforMYOB filter mechanism allows restriction of data through text boxes. Simply enter the code/title (as appropriate) upon which you wish to restrict the report, and combo boxes; and then choose from a drop-down list of the codes/title for each particular category of information. The list of filters appear when the **'Add a Textual Filter'** link is clicked, and the advanced page now displays all the existing filters, as shown in Figure 38. In addition, numeric filters can be applied to the data, when the **'Add a Numeric Filter'** link is clicked, to add restrictions to the source or result fields that are employed at the reports.

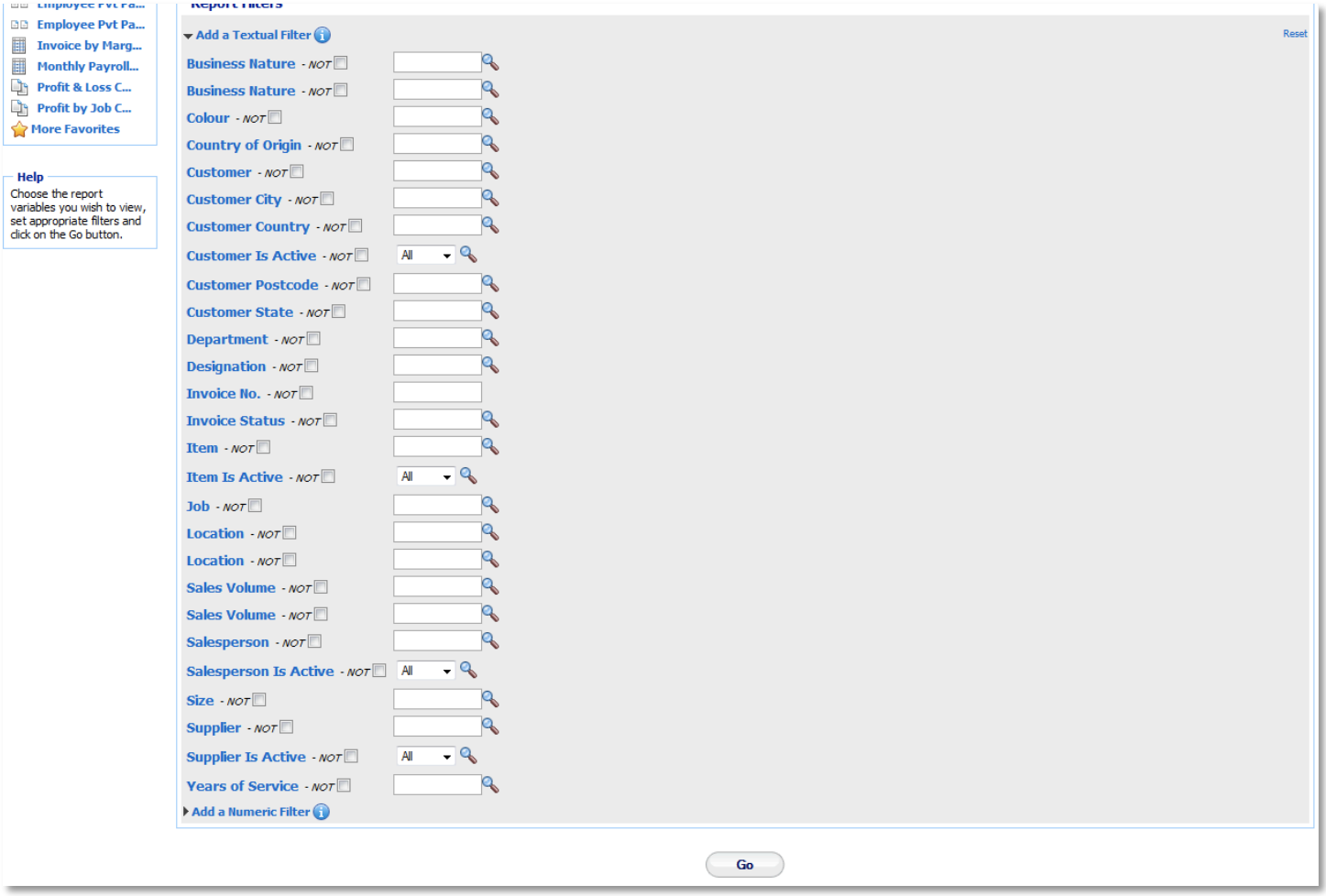


Figure 31

3.12 Search Icon

The **'Search'** icon (represented by the magnifying glass next to the filter values) allows the user to select specific fields from the filter categories. This is especially useful if a filter has a large quantity of values or if the user wishes to select more than one value from a multi-select combo-box. Clicking on the magnifying glass opens a new page as the one shown in Figure 9.

To select a filter value that should be included in the report, either highlight it in the **'Search Results'** section and click the relevant arrow button, or double click it. If the search results list contains a large amount of data, it may be easier to use the search box. The user may enter part or all of the value they want into the box and press **'Search'**. To view the full range of values again click the **'Show All'** button. Once the selection has been made, click the **'Done'** button. When the user returns to the filter page they will see the values chosen highlighted.

3.13 Range Selection

BIforMYOB supports ranged selection in text box filter fields such as the Invoice field seen in Figure 38. The character ":" is used as the range indicator. Please note that the selection range is inclusive, i.e. –5:3 is all records including –5 and 3. Examples:

- -5:3 (from -5 to 3 inclusive)
- :5 (everything less than or equal to 5)
- 8: (everything greater than or equal to 8).

E:G This also works in a case-insensitive fashion for characters - e.g. E:G will select E, F and G)

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Chapter 4 - Viewing Reports

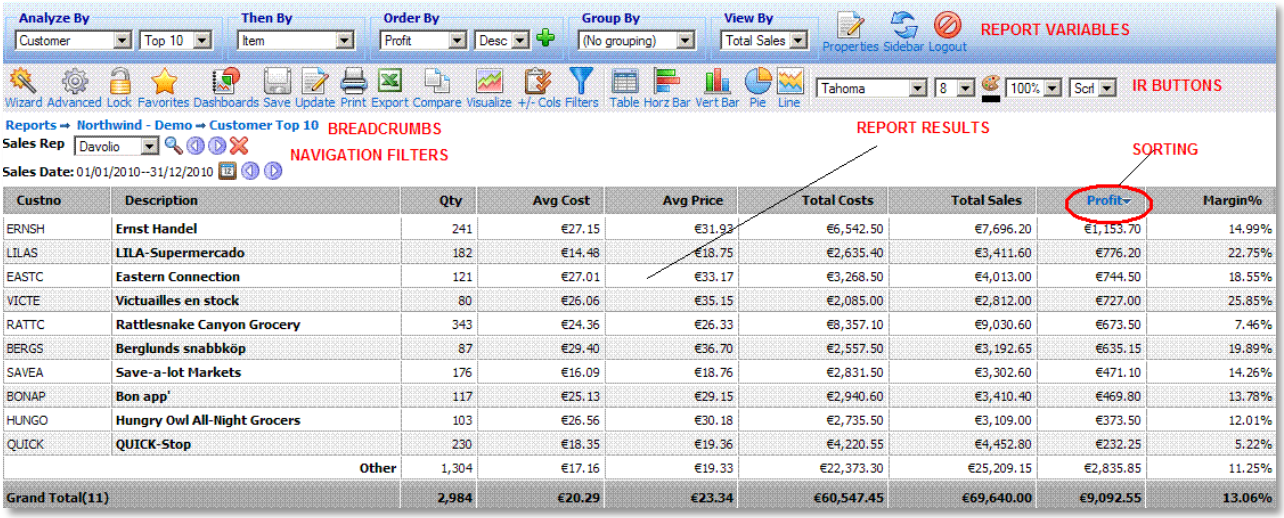
BIforMYOB in Action…

To demonstrate the flexibility and easy-to-use functionality of BIforMYOB we utilize the MYOB Clearwater sample database to generate reports. In a similar fashion to our example reports, BIforMYOB can analyse your company's data within minutes.

4.1 Standard Report

A typical **'Standard'** report looks like the one shown in Figure 39. To generate this report you can use either the wizard or the advanced interfaces, as described in the previous chapters, to set **'Analyze by'** to Customer, **'Then by'** to Item, order the results by Profit, view the **'Top 10'** records by Total Sales, set the initial and final dates to the beginning and end of 2010, respectively, and filter the data.

The report page contains five parts: the report variables section on the page header, the BIforMYOB functionality buttons, the Breadcrumbs, the date and non-date Navigation Filters, and the Report Results.



Custno	Description	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
ERNSH	Ernst Handel	241	€27.15	€31.93	€6,542.50	€7,696.20	€1,153.70	14.99%
LILAS	LILA-Supermercado	182	€14.48	€18.75	€2,635.40	€3,411.60	€776.20	22.75%
EASTC	Eastern Connection	121	€27.01	€33.17	€3,268.50	€4,013.00	€744.50	18.55%
VICTE	Victuailles en stock	80	€26.06	€35.15	€2,085.00	€2,812.00	€727.00	25.85%
RATTC	Rattlesnake Canyon Grocery	343	€24.36	€26.33	€8,357.10	€9,030.60	€673.50	7.46%
BERGS	Berglunds snabbköp	87	€29.40	€36.70	€2,557.50	€3,192.65	€635.15	19.89%
SAVEA	Save-a-lot Markets	176	€16.09	€18.76	€2,831.50	€3,302.60	€471.10	14.26%
BONAP	Bon app'	117	€25.13	€29.15	€2,940.60	€3,410.40	€469.80	13.78%
HUNGO	Hungry Owl All-Night Grocers	103	€26.56	€30.18	€2,735.50	€3,109.00	€373.50	12.01%
QUICK	QUICK-Stop	230	€18.35	€19.36	€4,220.55	€4,452.80	€232.25	5.22%
	Other	1,304	€17.16	€19.33	€22,373.30	€25,209.15	€2,835.85	11.25%
Grand Total(11)		2,984	€20.29	€23.34	€60,547.45	€69,640.00	€9,092.55	13.06%

Figure 32

 © Interactive Reporting

4.2 Report Variables

The report variables section at the header of the report page allows the user to modify their report without the need to return to the wizard or advanced interfaces. The user can change any of the report variable options to generate new reports.

- **Analyze by** – determines the first level of data for the report
- **Then by** – allows the change of the secondary level of report
- **Order by** – determines the ordering of the data. Clicking the + icon next to the Order by dropdown list opens a popup window, like the one shown in Figure 40, which enables the user to add multiple order by options when generating the report. A report can be created with a maximum of 3 Order by fields.
- **Group by** – determines how to group the results following a particular categorization.
- **View by** – determines the value upon which the Top/Bottom option is chosen.
- **Properties** – determines various options for showing/hiding specific rows from the reports and for selecting different table layouts.
- **Sidebar** – allows the user to switch from the toolbar view to the sidebar view, which is shown at Figure 41. In this layout the BIforMYOB buttons that appear underneath the header section of Figure 39 have now moved to the sidebar menu that appears at the left side of the page. To switch back to the previous layout with the toolbar buttons, the user must click the 'Toolbar' button, as shown in Figure 41.
- **Logout** – logs the user out of BIforMYOB.

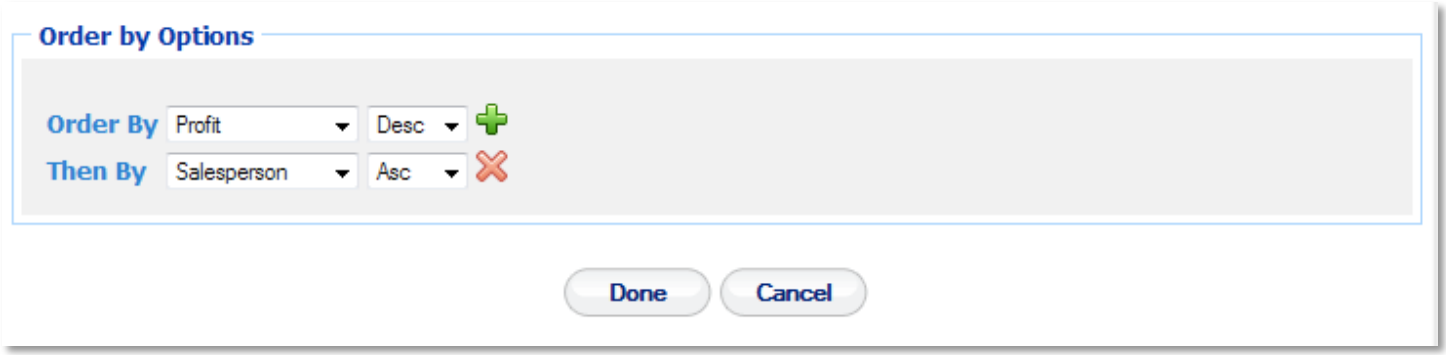
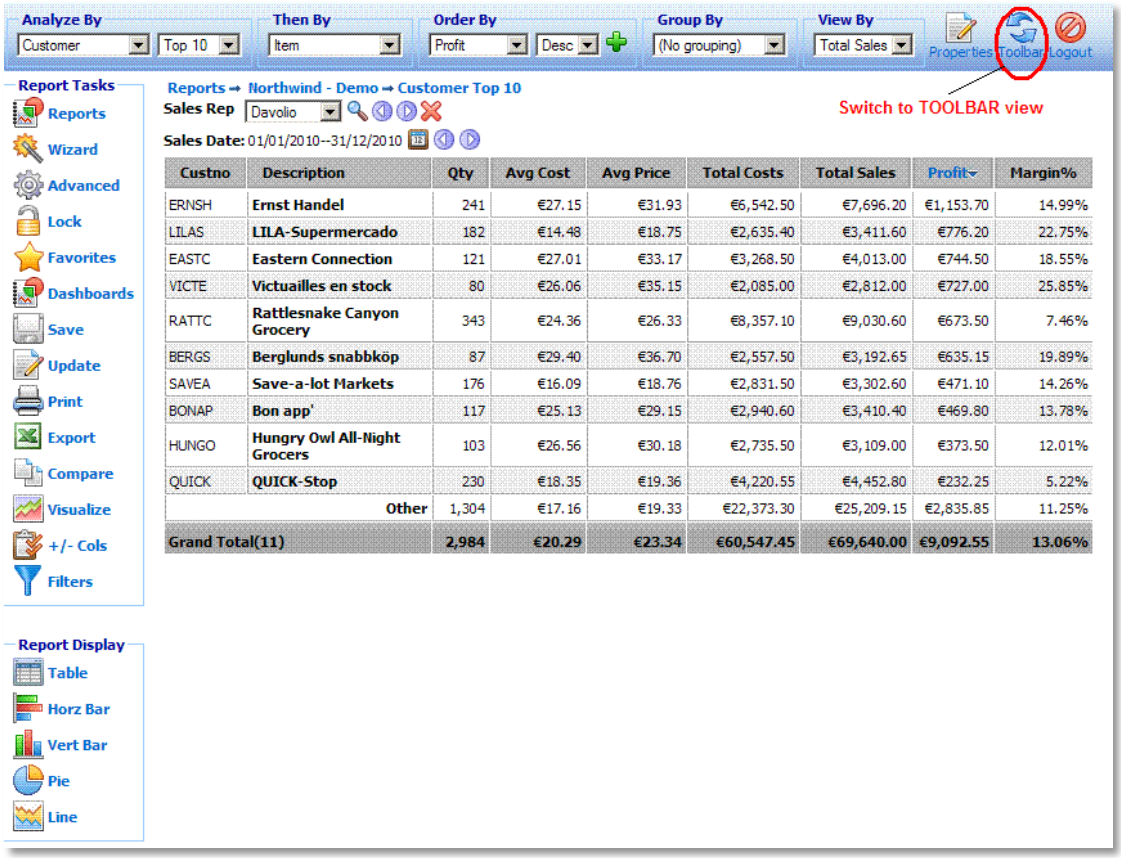


Figure 33



Custno	Description	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
ERNSH	**Ernst Handel**	241	€27.15	€31.93	€6,542.50	€7,696.20	€1,153.70	14.99%
LILAS	**LILA-Supermercado**	182	€14.48	€18.75	€2,635.40	€3,411.60	€776.20	22.75%
EASTC	**Eastern Connection**	121	€27.01	€33.17	€3,268.50	€4,013.00	€744.50	18.55%
VICTE	**Victuailles en stock**	80	€26.06	€35.15	€2,085.00	€2,812.00	€727.00	25.85%
RATTC	**Rattlesnake Canyon Grocery**	343	€24.36	€26.33	€8,357.10	€9,030.60	€673.50	7.46%
BERGS	**Berglunds snabbköp**	87	€29.40	€36.70	€2,557.50	€3,192.65	€635.15	19.89%
SAVEA	**Save-a-lot Markets**	176	€16.09	€18.76	€2,831.50	€3,302.60	€471.10	14.26%
BONAP	**Bon app'**	117	€25.13	€29.15	€2,940.60	€3,410.40	€469.80	13.78%
HUNGO	**Hungry Owl All-Night Grocers**	103	€26.56	€30.18	€2,735.50	€3,109.00	€373.50	12.01%
QUICK	**QUICK-Stop**	230	€18.35	€19.36	€4,220.55	€4,452.80	€232.25	5.22%
	Other	1,304	€17.16	€19.33	€22,373.30	€25,209.15	€2,835.85	11.25%
Grand Total(11)		**2,984**	**€20.29**	**€23.34**	**€60,547.45**	**€69,640.00**	**€9,092.55**	**13.06%**

Figure 34

4.3 BIforMYOB Buttons

BIforMYOB provides a set of buttons that perform various actions to the generated reports. Each type of report contains its own list of buttons. The buttons that appear at a standard report are the following:

- **Wizard** – directs the user to the wizard interface for the generation of a new report.
- **Advanced** – directs the user to the advanced interface for the generation of a new report.
- **Lock** – allows the user to lock some of the textual columns of a report. This button is only available to the Internet Explorer users.
- **Favorites** – directs the user to the 'Favorites' page that contains all the predefined reports, see Figure 29.
- **Save** – allows the user to save a new report as a favorite. When clicking this button the user is redirected to the page of Figure 42. The user can set the title of the new favorite, schedule it for emails, share it with other users, and assign it to a specific category of saved reports. Clicking the 'Save' button returns the user to the report page.
- **Update** – allows the user to update an existing favorite report. When clicking this button the user is redirected to the page of Figure 43. The user can then select from the list which existing favorite report they wish to update. Clicking the **'Update'** button redirects the user to a page similar to that of Figure 42, so that the user can then edit the favorites options if they wish before finalising the update procedure. Clicking the **'Update'** button returns the user to the report page.
- **Print** – enables the user to print the current report. In the standard grouped report format, there is the additional option to print each subgroup at a separate page, as well as print the whole report as a total.
- **Export** ¬– enables the user to view the report in Excel.
- **Compare** – allows the user to produce a comparison report form the one currently in view. Clicking this button directs the user to the comparison date range selection page, as shown in Figure 44. After selecting the desired date ranges for the report, click 'Compare' and the new comparison report appears.
- **+/- Cols** – allows the user to modify the report configuration by adding/removing columns that appear at the report. When this button is clicked a new window opens, as the one shown in Figure 46. The user can then select which textual and/or numeric fields wishes to hide or show at the report. Moreover, the order with which the numeric fields can appear in the table can also be modified by selecting the field of interest and clicking the up/down arrows that exist next to the Show header of the right panel. When the user is finished with their selection, the 'Done' button must be clicked to return to the report page, which will now contain the new collection of fields.
- **Filters** – allows the user to apply new filters or modify existing filter values. When this button is clicked a new window opens, as the one shown in Figure 47. The user can then select which textual and/or numeric filters to apply to the report. When the user is finished with their selection, the 'Done' button must be clicked to return to the report page.
- **Table** – displays the report at a table format, as shown in Figure 39.
- **Horz bar** – displays the report as a horizontal bar chart.
- **Vert bar** – displays the report as a vertical bar chart.
- **Pie** – displays the report as a pie chart.
- **Line** – displays the report as a line chart.
- **Fonts** – allows the user to select the font family, size and colour they prefer for viewing the report.
- **Width** – allows the user to set the width of the table.
- **Paging** – allows the user to select how many data to view at a page or select whether to view data with or without scrollbars.

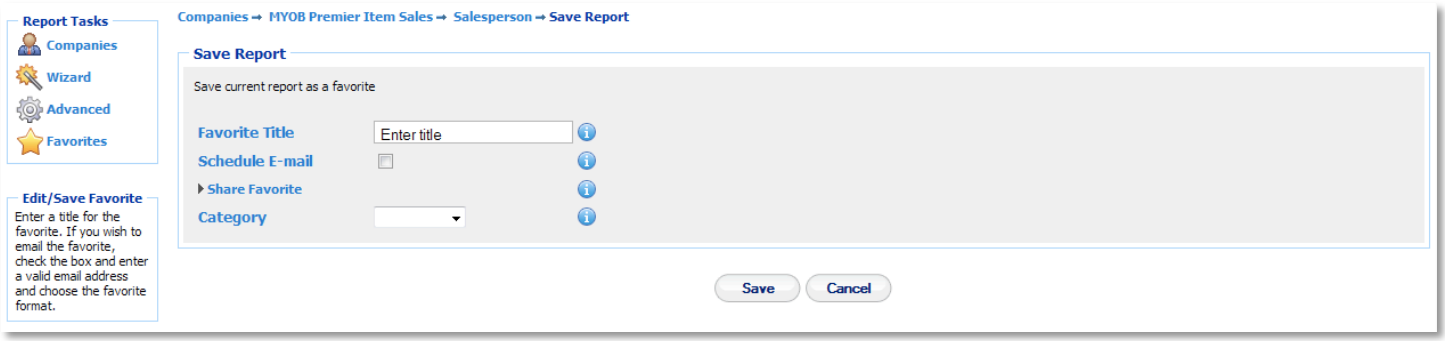


Figure 35

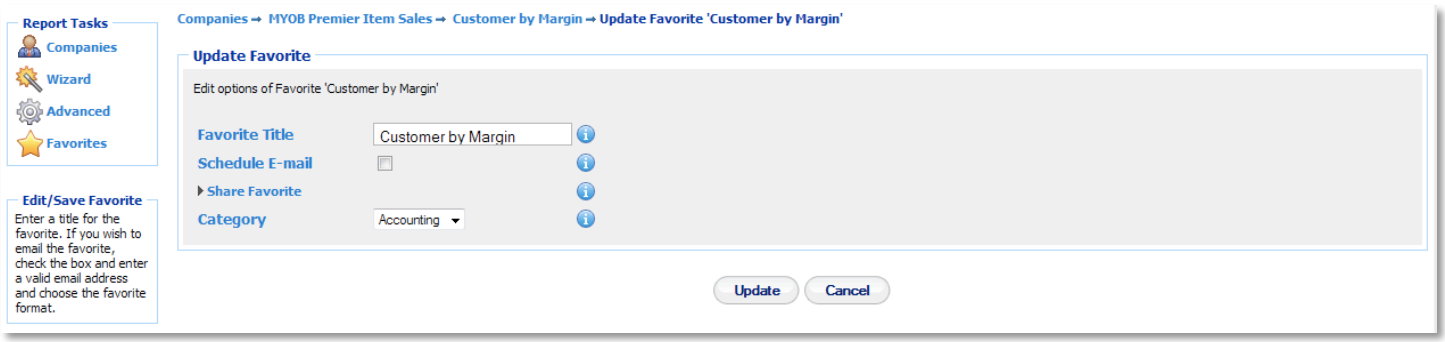

Report Tasks
Companies
Wizard
Advanced
Favorites
Edit/Save Favorite
Enter a title for the favorite. If you wish to email the favorite, check the box and enter a valid email address and choose the favorite format.
Companies ➞ MYOB Premier Item Sales ➞ Customer by Margin ➞ Update Favorite 'Customer by Margin'
Update Favorite
Edit options of Favorite 'Customer by Margin'
Favorite Title
Customer by Margin
Schedule E-mail
Share Favorite
Category
Accounting
Update
Cancel

Figure 36

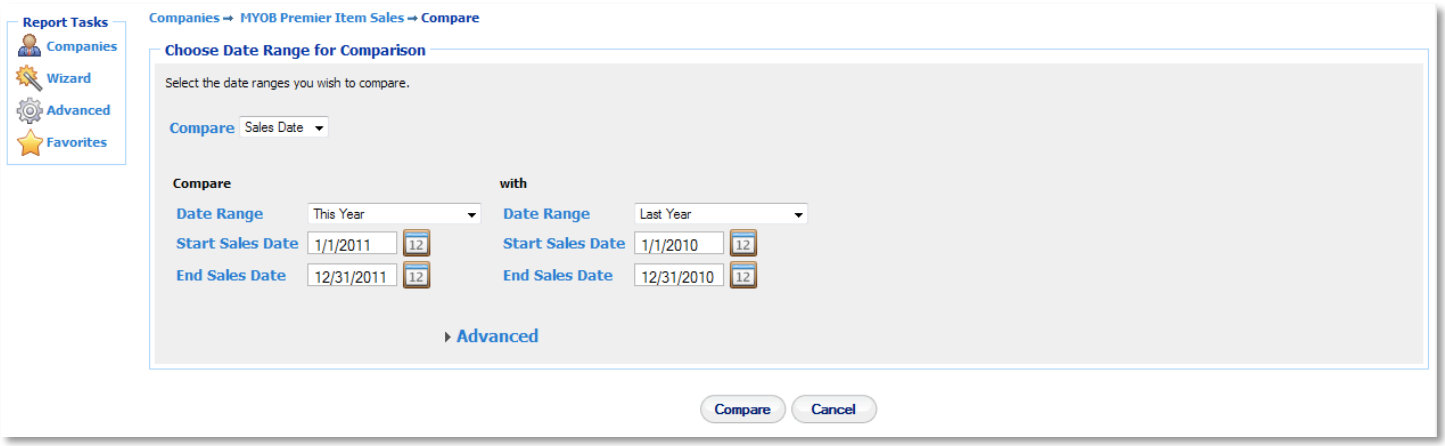


Figure 37

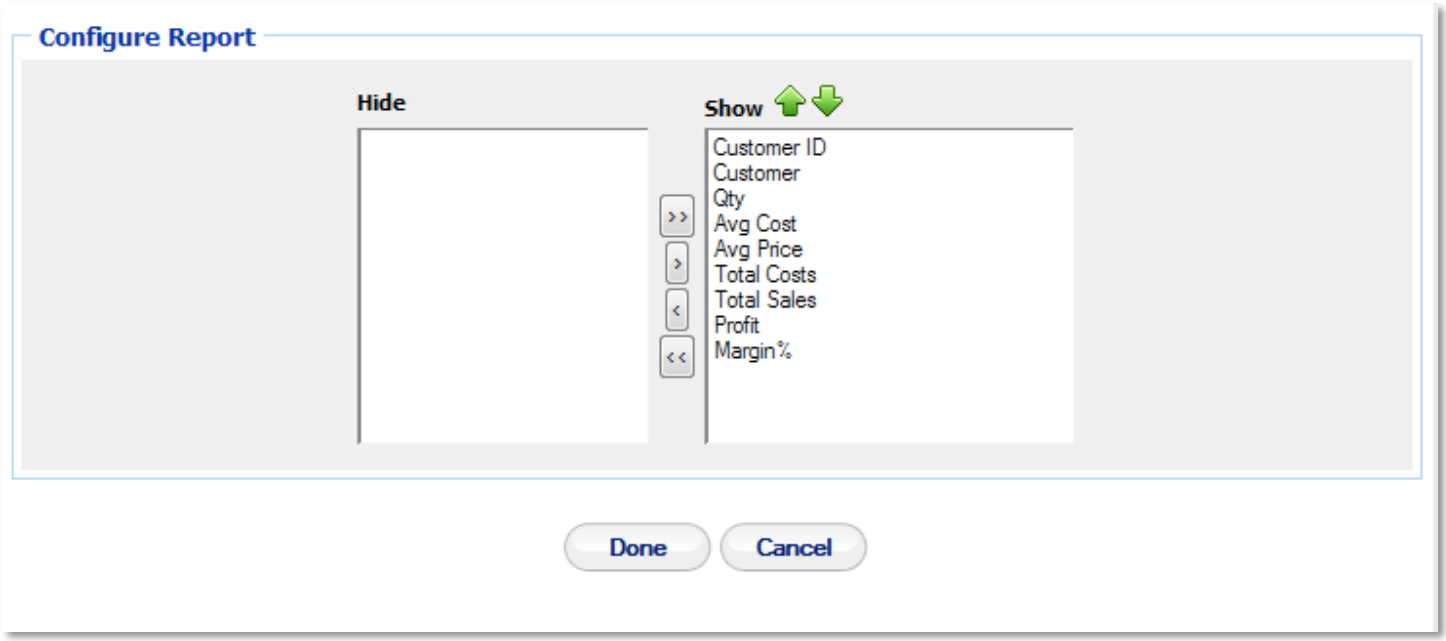


Figure 39

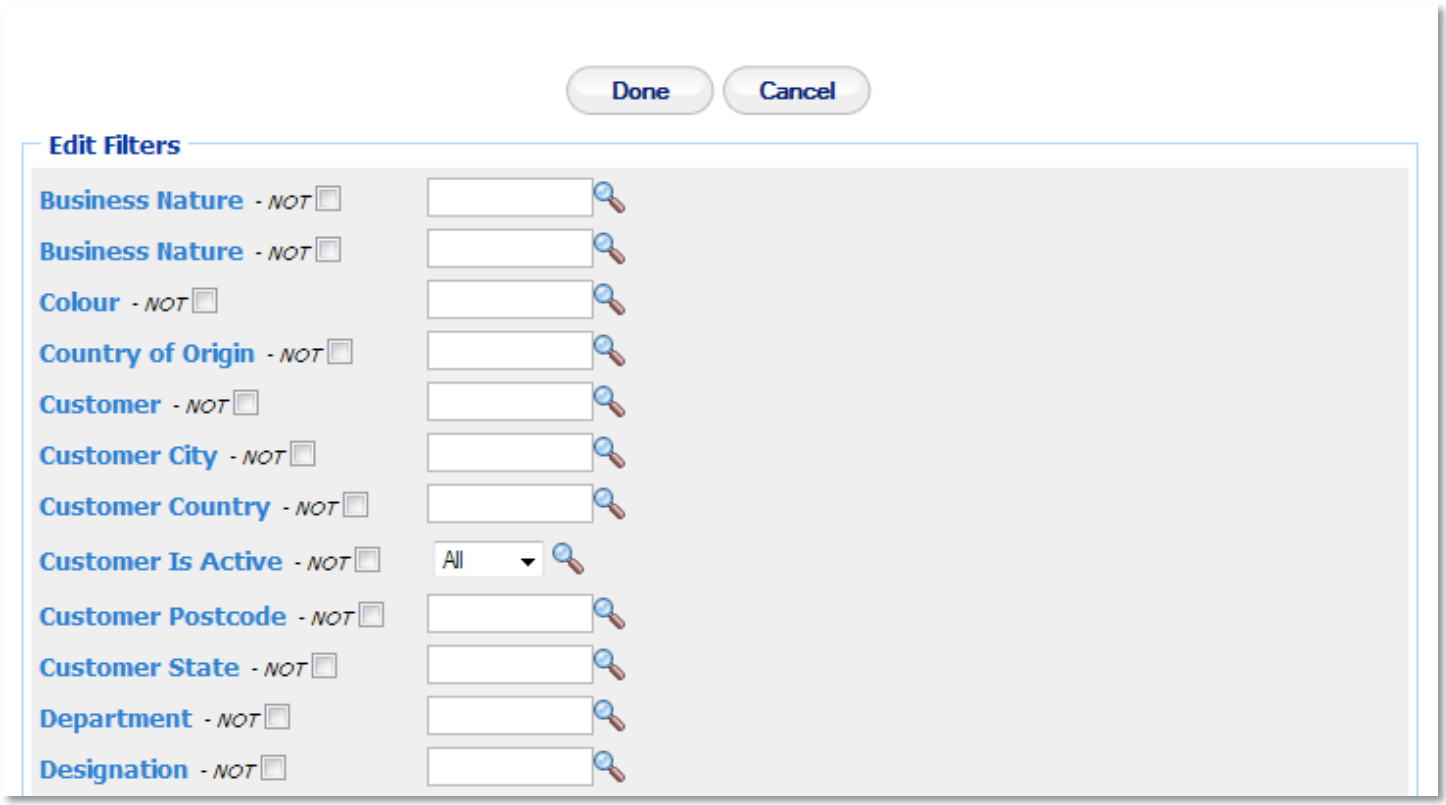


Figure 40

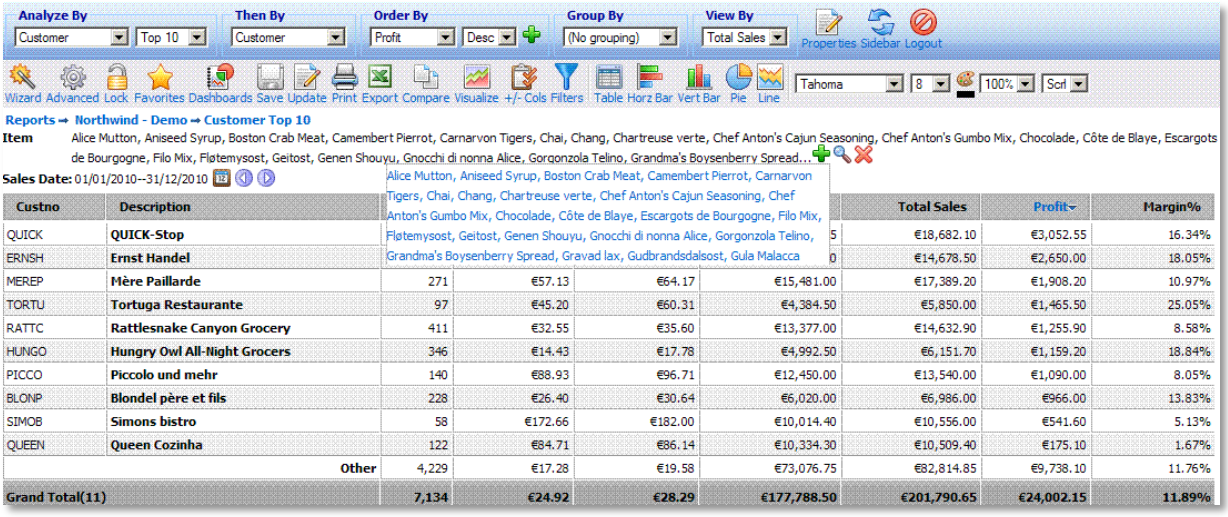
4.4 Breadcrumbs

The breadcrumbs indicate all the steps taken by the user to reach the current page/level of the report. To return to an earlier page the user simply clicks the relevant section of the breadcrumb link. The start of every breadcrumb is **'Reports'** which redirects to the **'Choose Report'** page, Figure 2. The second step of the breadcrumb sequence is the name of the report, which returns the user to the wizard or advanced interface depending on which one they used to create the particular report they view. Subsequent steps of the breadcrumbs return to previously visited BIforMYOB pages or reports. The last breadcrumb link allows the user to edit the last report query via the advanced or wizard pages.

4.5 Navigation Filters

The navigation filters part of the report page contains all the non-date and date filters that have been applied to the report. Apart from displaying useful information, the user also has the option to modify these filter values from the report page itself.

For non-date filters, a new filter value can be selected by changing the value of the select list that appears next to the filter name, for example in Figure 39 by changing the value of Davolio to Buchanan. Another way is to click on the search icon next to the select list to make a single or multiple filter selection. The '<<' and '>>' buttons navigate to the previous and next values in the select list, respectively. When a large number of filter values are selected only the first 20 values are displayed on the report page, but a '+' appears next to the list of filter values, which when clicked shows all the filter values selected, as seen in Figure 48. Finally, a filter can be removed by clicking the delete icon next to its value. If a filter is of the text format, the select list that enables navigation does not appear, and the user can choose a new value by clicking the search icon.



Custno	Description					Total Sales	Profit	Margin%
QUICK	**QUICK-Stop**				5	€18,682.10	€3,052.55	16.34%
ERNSH	**Ernst Handel**				0	€14,678.50	€2,650.00	18.05%
MEREP	**Mère Paillarde**	271	€57.13	€64.17	€15,481.00	€17,389.20	€1,908.20	10.97%
TORTU	**Tortuga Restaurante**	97	€45.20	€60.31	€4,384.50	€5,850.00	€1,465.50	25.05%
RATTC	**Rattlesnake Canyon Grocery**	411	€32.55	€35.60	€13,377.00	€14,632.90	€1,255.90	8.58%
HUNGO	**Hungry Owl All-Night Grocers**	346	€14.43	€17.78	€4,992.50	€6,151.70	€1,159.20	18.84%
PICCO	**Piccolo und mehr**	140	€88.93	€96.71	€12,450.00	€13,540.00	€1,090.00	8.05%
BLONP	**Blondel père et fils**	228	€26.40	€30.64	€6,020.00	€6,986.00	€966.00	13.83%
SIMOB	**Simons bistro**	58	€172.66	€182.00	€10,014.40	€10,556.00	€541.60	5.13%
QUEEN	**Queen Cozinha**	122	€84.71	€86.14	€10,334.30	€10,509.40	€175.10	1.67%
	Other	4,229	€17.28	€19.58	€73,076.75	€82,814.85	€9,738.10	11.76%
Grand Total(11)		**7,134**	**€24.92**	**€28.29**	**€177,788.50**	**€201,790.65**	**€24,002.15**	**11.89%**

Figure 41

The date range that determines a report can be modified more interactively from the same report page, by clicking the calendar icon next to the date range. A page like the one shown in Figure 49 enables the user to select a new date range for their report. The **'<<'** and **'>>'** buttons change the date range backwards and forwards by the same amount of time as the one used to generate the report. In the example report of Figure 39, clicking the '<<' button would have generated reports for the year 2009, or clicking the '>>' button would have generated reports for the year 2011. As another example, if a user had generated a report for April 2005, the '<<' and '<<' buttons would have created reports for March 2005 and May 2005, respectively.

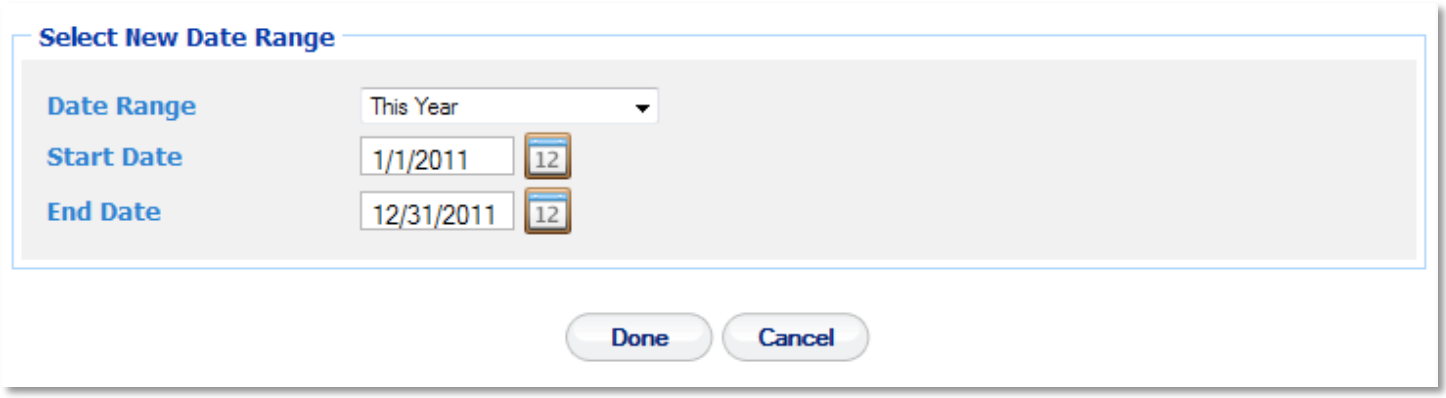


Figure 42

4.6 Report Results

The final and more important part of the page contains the data that the user wishes to view. In a standard report, these are displayed within a table, but they can readily be represented by a chart or visualization format. The data can be seen within a scrollable table or not, and they can be sorted in ascending or descending order, from within the table itself. This can be done by clicking on the table column header of the field the user wishes to order by. In this case, a blue arrow appears next to the column heading, to indicate the sort order, as shown in Figure 39. In addition if a table contains too many columns the user can lock the textual columns, so that when scrolling horizontally there is always a point of reference as to which data the user sees. This locking of the textual columns can be retained in subsequent levels of reports.

Another feature is the possibility to highlight a specific row and/or column, as shown in Figure 50. Highlighting occurs by double clicking on the cell of interest. Double clicking the upper first left cell of the table removes highlighting from everywhere.

Customer ID	Customer	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
8	Smart Enterprise	210	$253.16	$324.94	$53,163.00	$68,238.10	$15,075.10	22.09%
1	A-Z Stationery Pte Ltd	115	$91.24	$143.27	$10,493.16	$16,476.19	$5,983.03	36.31%
5	My Town Realty	110	$86.58	$115.15	$9,523.82	$12,666.67	$3,142.85	24.81%
3	Happy Recreation Club	15	$125.67	$198.89	$1,885.07	$2,983.32	$1,098.25	36.81%
Grand Total(4)		450	$166.81	$223.03	$75,065.05	$100,364.29	$25,299.24	25.21%

Figure 43

The way the report results are displayed can also be modified from within the **'Properties'** options, which appear on a new popup window when clicking the relative button of the report variables, as shown in Figure 51. By selecting the **'Vertical'** layout the data table can then be displayed in a vertical layout, with the labels appearing in rows and the data in columns, as displayed in Figure 52. By unselecting the option to 'Show Grand Total' the report is shown without the grand total row in horizontal/column in vertical layout see Figure 53. When a Top/Bottom selection is applied, selecting to view the **'Show Other Data'** the results will include a row with the sum of the remaining data, as shown in Figure 39. By unselecting the option to view the **'Show Report Rows'** only the totals of a report can be displayed, see Figure 54. By selecting to **'Suppress Headers'** from Excel and printout reports, all the information displayed by the filters and date ranges data is not shown.

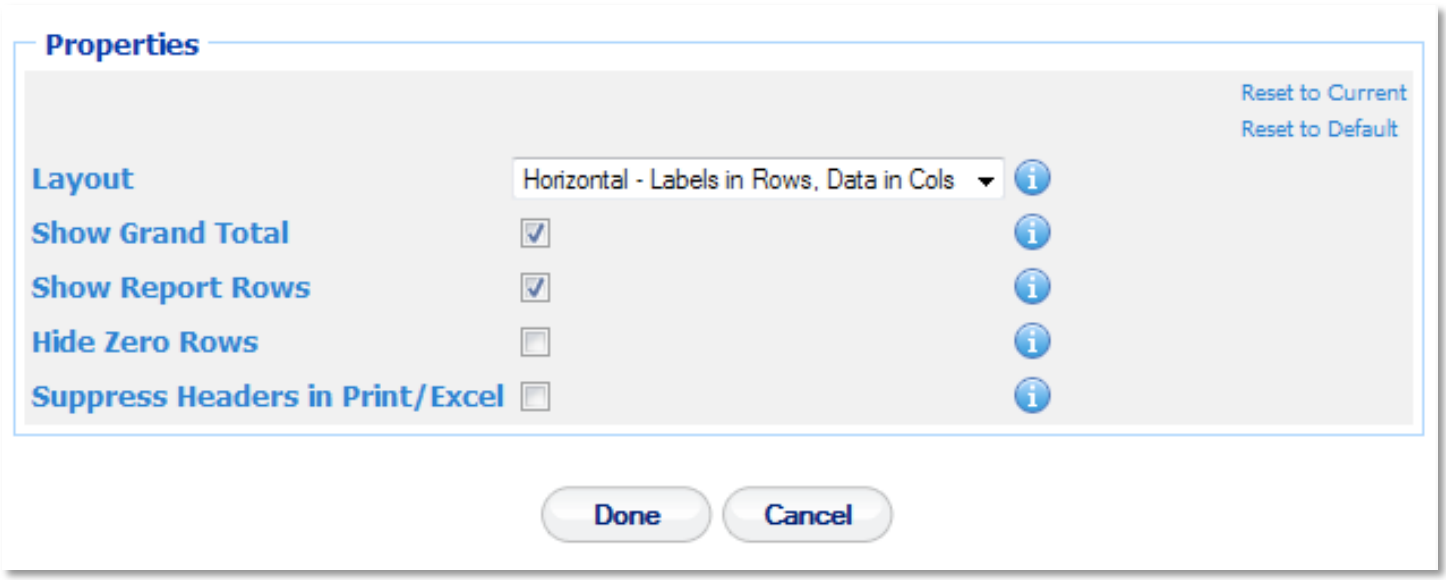
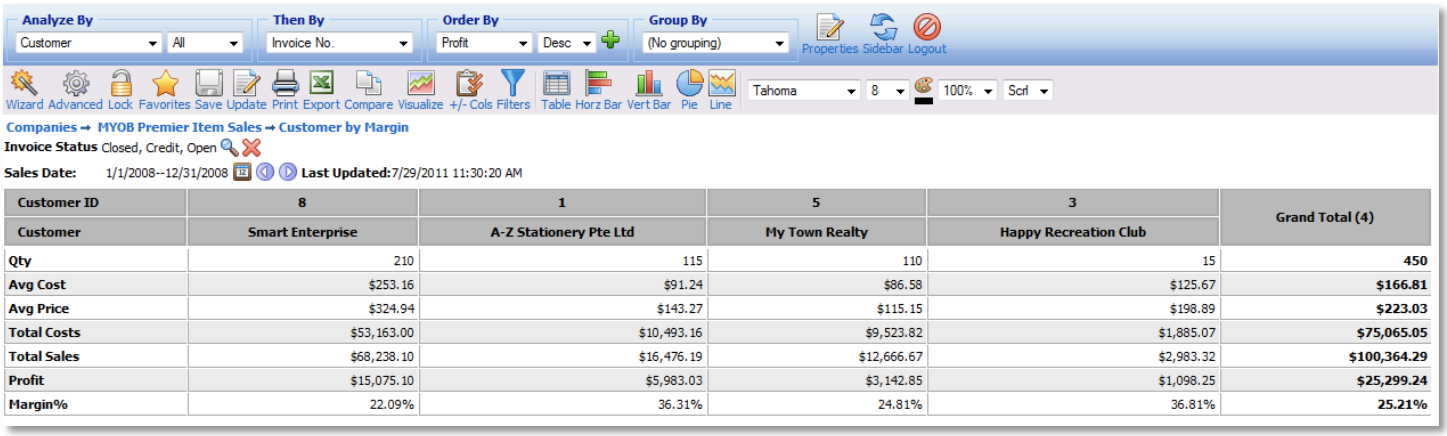
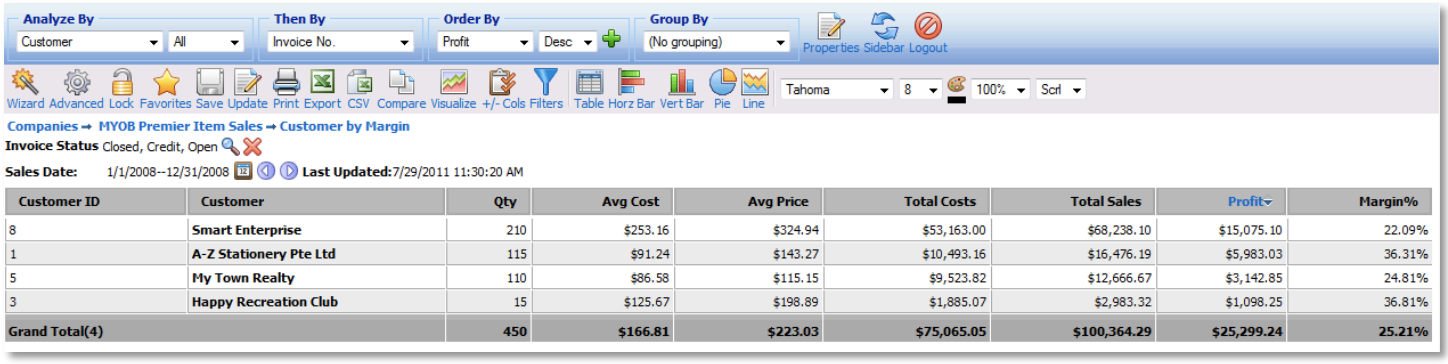


Figure 44



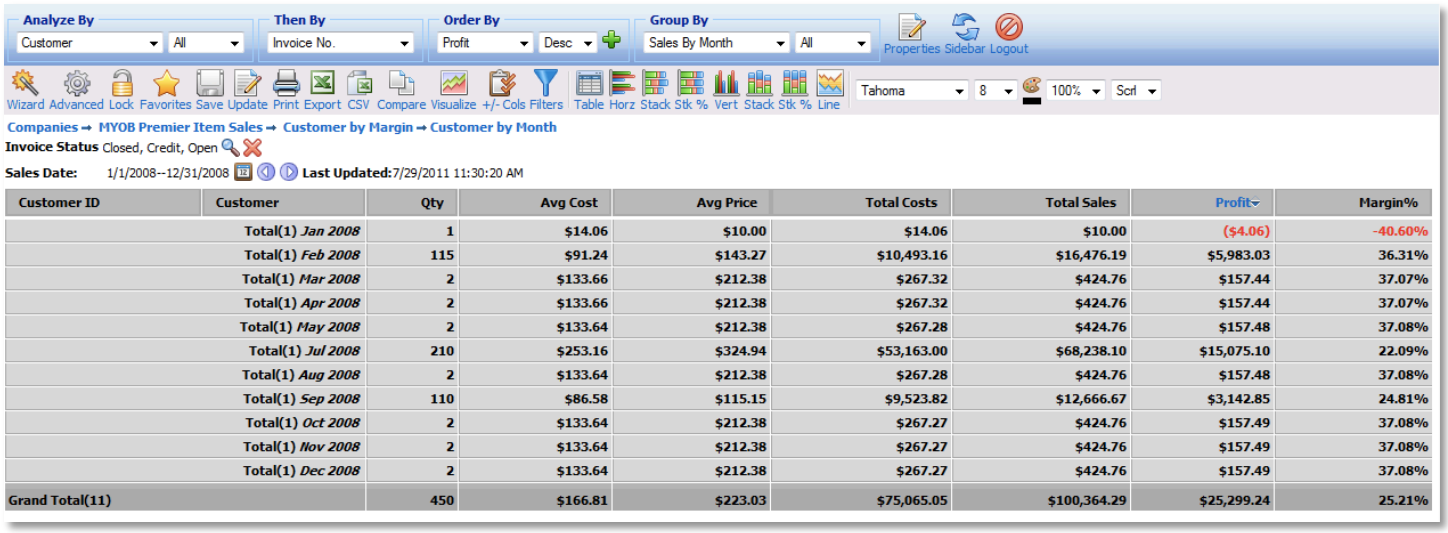
Customer ID	8	1	5	3	Grand Total (4)
Customer	Smart Enterprise	A-Z Stationery Pte Ltd	My Town Realty	Happy Recreation Club	
Qty	210	115	110	15	450
Avg Cost	$253.16	$91.24	$86.58	$125.67	$166.81
Avg Price	$324.94	$143.27	$115.15	$198.89	$223.03
Total Costs	$53,163.00	$10,493.16	$9,523.82	$1,885.07	$75,065.05
Total Sales	$68,238.10	$16,476.19	$12,666.67	$2,983.32	$100,364.29
Profit	$15,075.10	$5,983.03	$3,142.85	$1,098.25	$25,299.24
Margin%	22.09%	36.31%	24.81%	36.81%	25.21%

Figure 45



Customer ID	Customer	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
8	**Smart Enterprise**	210	$253.16	$324.94	$53,163.00	$68,238.10	$15,075.10	22.09%
1	**A-Z Stationery Pte Ltd**	115	$91.24	$143.27	$10,493.16	$16,476.19	$5,983.03	36.31%
5	**My Town Realty**	110	$86.58	$115.15	$9,523.82	$12,666.67	$3,142.85	24.81%
3	**Happy Recreation Club**	15	$125.67	$198.89	$1,885.07	$2,983.32	$1,098.25	36.81%
Grand Total(4)		**450**	**$166.81**	**$223.03**	**$75,065.05**	**$100,364.29**	**$25,299.24**	**25.21%**

Figure 46

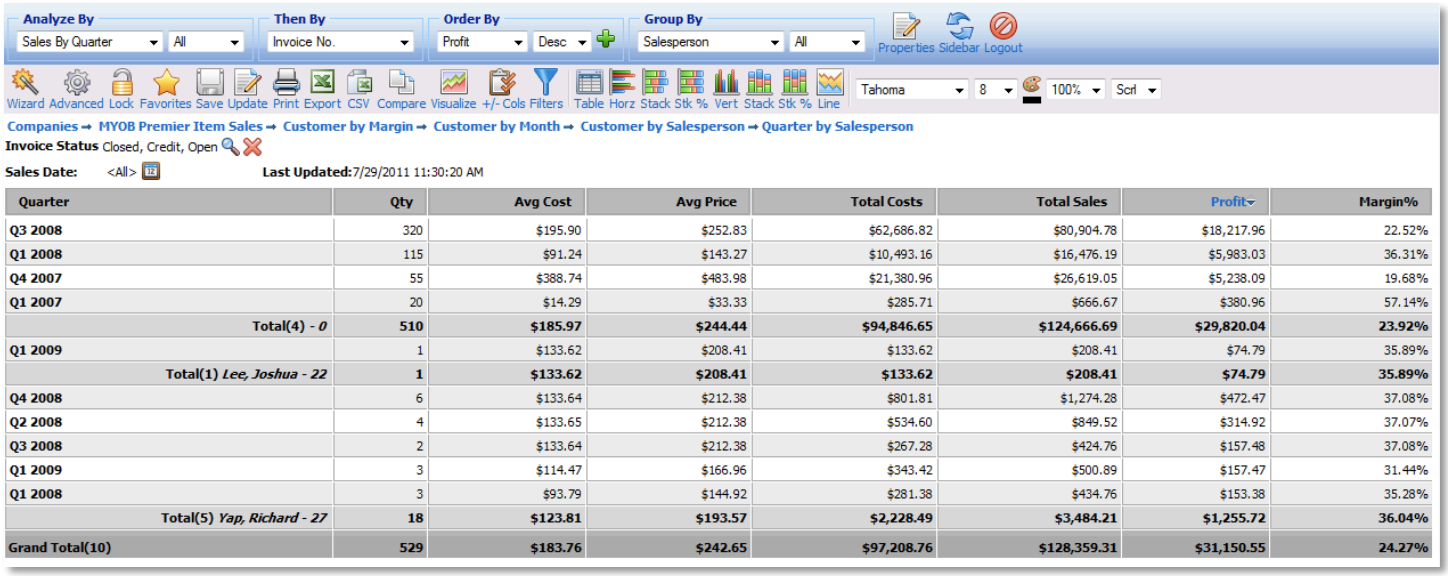


Customer ID	Customer	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
	Total(1) *Jan 2008*	**1**	**$14.06**	**$10.00**	**$14.06**	**$10.00**	**($4.06)**	**-40.60%**
	Total(1) *Feb 2008*	**115**	**$91.24**	**$143.27**	**$10,493.16**	**$16,476.19**	**$5,983.03**	**36.31%**
	Total(1) *Mar 2008*	**2**	**$133.66**	**$212.38**	**$267.32**	**$424.76**	**$157.44**	**37.07%**
	Total(1) *Apr 2008*	**2**	**$133.66**	**$212.38**	**$267.32**	**$424.76**	**$157.44**	**37.07%**
	Total(1) *May 2008*	**2**	**$133.64**	**$212.38**	**$267.28**	**$424.76**	**$157.48**	**37.08%**
	Total(1) *Jul 2008*	**210**	**$253.16**	**$324.94**	**$53,163.00**	**$68,238.10**	**$15,075.10**	**22.09%**
	Total(1) *Aug 2008*	**2**	**$133.64**	**$212.38**	**$267.28**	**$424.76**	**$157.48**	**37.08%**
	Total(1) *Sep 2008*	**110**	**$86.58**	**$115.15**	**$9,523.82**	**$12,666.67**	**$3,142.85**	**24.81%**
	Total(1) *Oct 2008*	**2**	**$133.64**	**$212.38**	**$267.27**	**$424.76**	**$157.49**	**37.08%**
	Total(1) *Nov 2008*	**2**	**$133.64**	**$212.38**	**$267.27**	**$424.76**	**$157.49**	**37.08%**
	Total(1) *Dec 2008*	**2**	**$133.64**	**$212.38**	**$267.27**	**$424.76**	**$157.49**	**37.08%**
Grand Total(11)		**450**	**$166.81**	**$223.03**	**$75,065.05**	**$100,364.29**	**$25,299.24**	**25.21%**

Figure 47

4.7 Grouping

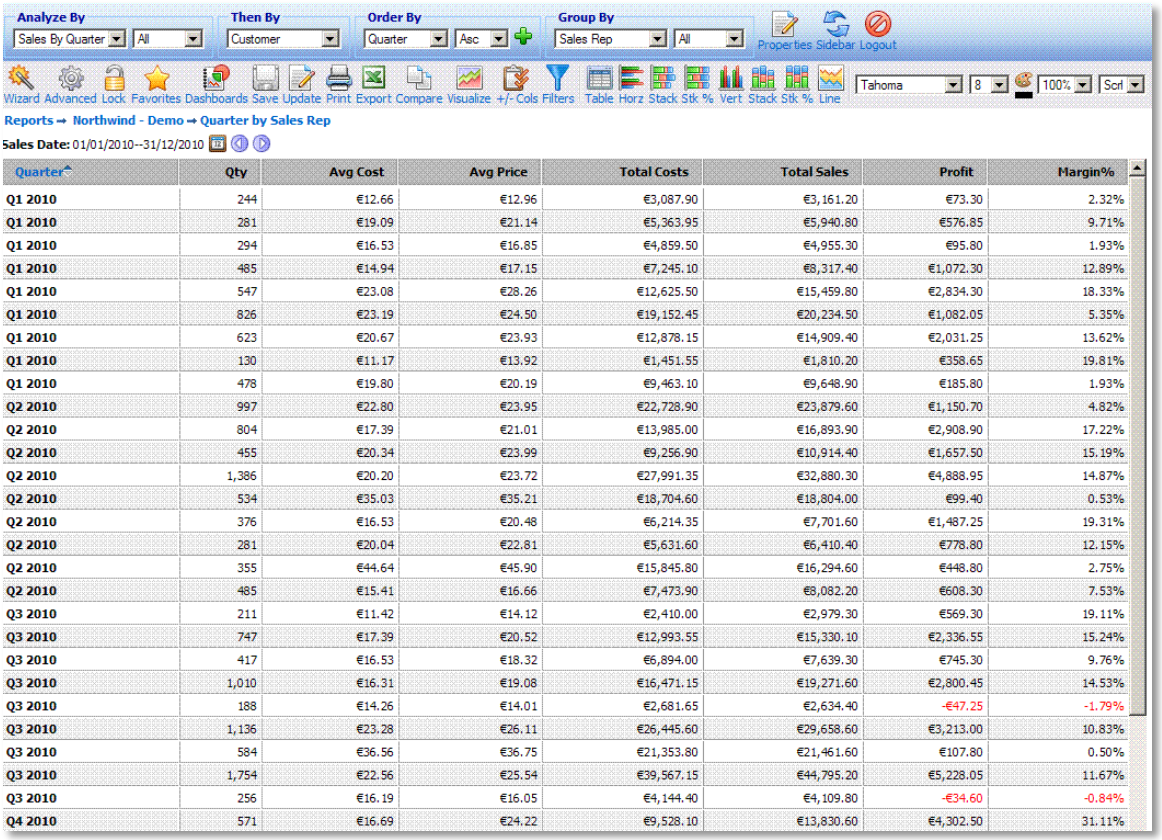
When looking at a particular report, one can choose to group the results following a particular categorization. As an example, Figure 55 shows a report on *Sales by Quarter* grouped by *Sales Rep*. We can see that a grouped report produces subtotals of the quantities of interest for each of the sales representatives. One may change the grouping variable or revert to the simpler analysis given earlier by selecting as appropriate from the **'Group by'** dropdown. From the **'Properties'** options, Figure 51, the user can select to hide the group subtotals and view only the report results, Figure 56. An alternative table structure can also be used for the grouped reports, by selecting the **'Columns'** option from the **'Group Layout'** option of the **'Properties'**, in which the group values are shown in separate columns in the left part of the table, as shown in Figure 57.



Quarter	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
Q3 2008	320	$195.90	$252.83	$62,686.82	$80,904.78	$18,217.96	22.52%
Q1 2008	115	$91.24	$143.27	$10,493.16	$16,476.19	$5,983.03	36.31%
Q4 2007	55	$388.74	$483.98	$21,380.96	$26,619.05	$5,238.09	19.68%
Q1 2007	20	$14.29	$33.33	$285.71	$666.67	$380.96	57.14%
Total(4) - *0*	**510**	**$185.97**	**$244.44**	**$94,846.65**	**$124,666.69**	**$29,820.04**	**23.92%**
Q1 2009	1	$133.62	$208.41	$133.62	$208.41	$74.79	35.89%
Total(1) *Lee, Joshua - 22*	**1**	**$133.62**	**$208.41**	**$133.62**	**$208.41**	**$74.79**	**35.89%**
Q4 2008	6	$133.64	$212.38	$801.81	$1,274.28	$472.47	37.08%
Q2 2008	4	$133.65	$212.38	$534.60	$849.52	$314.92	37.07%
Q3 2008	2	$133.64	$212.38	$267.28	$424.76	$157.48	37.08%
Q1 2009	3	$114.47	$166.96	$343.42	$500.89	$157.47	31.44%
Q1 2008	3	$93.79	$144.92	$281.38	$434.76	$153.38	35.28%
Total(5) *Yap, Richard - 27*	**18**	**$123.81**	**$193.57**	**$2,228.49**	**$3,484.21**	**$1,255.72**	**36.04%**
Grand Total(10)	**529**	**$183.76**	**$242.65**	**$97,208.76**	**$128,359.31**	**$31,150.55**	**24.27%**

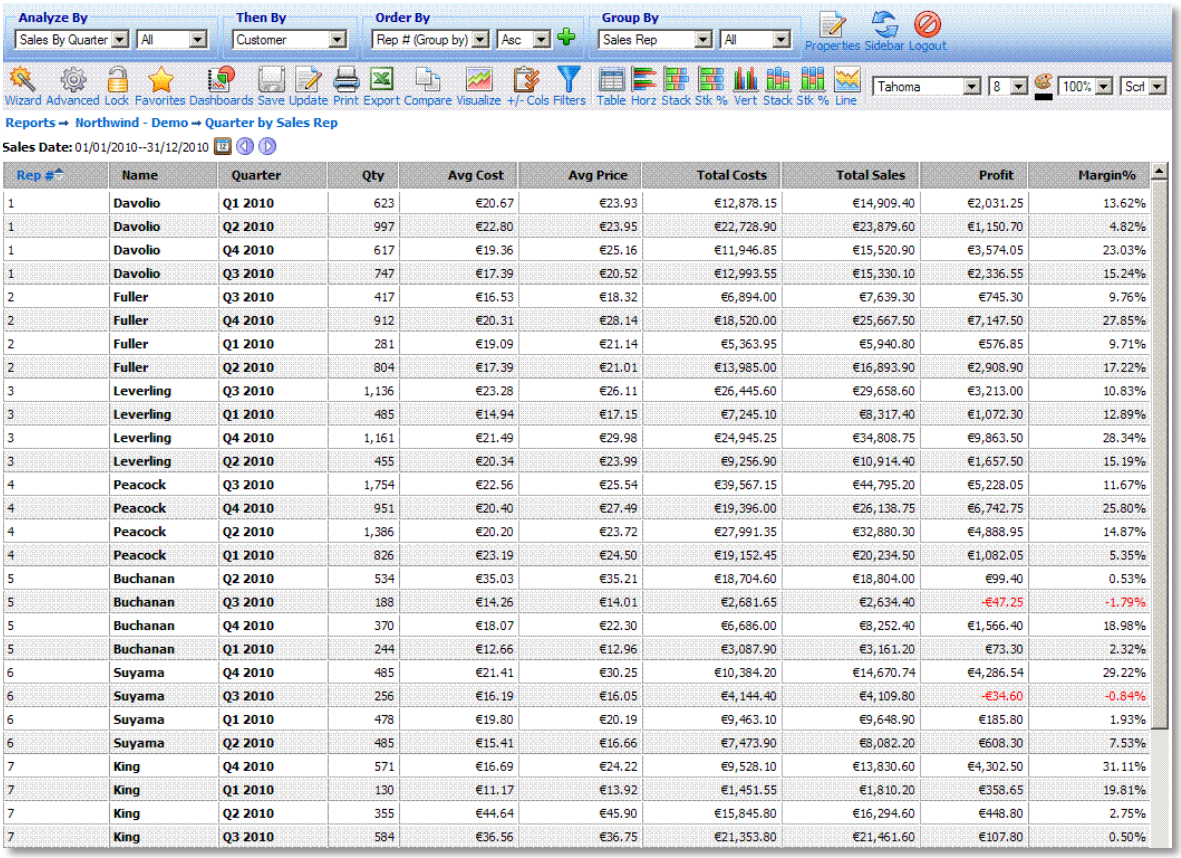
Figure 48

 © Interactive Reporting



Quarter	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
Q1 2010	244	€12.66	€12.96	€3,087.90	€3,161.20	€73.30	2.32%
Q1 2010	281	€19.09	€21.14	€5,363.95	€5,940.80	€576.85	9.71%
Q1 2010	294	€16.53	€16.85	€4,859.50	€4,955.30	€95.80	1.93%
Q1 2010	485	€14.94	€17.15	€7,245.10	€8,317.40	€1,072.30	12.89%
Q1 2010	547	€23.08	€28.26	€12,625.50	€15,459.80	€2,834.30	18.33%
Q1 2010	826	€23.19	€24.50	€19,152.45	€20,234.50	€1,082.05	5.35%
Q1 2010	623	€20.67	€23.93	€12,878.15	€14,909.40	€2,031.25	13.62%
Q1 2010	130	€11.17	€13.92	€1,451.55	€1,810.20	€358.65	19.81%
Q1 2010	478	€19.80	€20.19	€9,463.10	€9,648.90	€185.80	1.93%
Q2 2010	997	€22.80	€23.95	€22,728.90	€23,879.60	€1,150.70	4.82%
Q2 2010	804	€17.39	€21.01	€13,985.00	€16,893.90	€2,908.90	17.22%
Q2 2010	455	€20.34	€23.99	€9,256.90	€10,914.40	€1,657.50	15.19%
Q2 2010	1,386	€20.20	€23.72	€27,991.35	€32,880.30	€4,888.95	14.87%
Q2 2010	534	€35.03	€35.21	€18,704.60	€18,804.00	€99.40	0.53%
Q2 2010	376	€16.53	€20.48	€6,214.35	€7,701.60	€1,487.25	19.31%
Q2 2010	281	€20.04	€22.81	€5,631.60	€6,410.40	€778.80	12.15%
Q2 2010	355	€44.64	€45.90	€15,845.80	€16,294.60	€448.80	2.75%
Q2 2010	485	€15.41	€16.66	€7,473.90	€8,082.20	€608.30	7.53%
Q3 2010	211	€11.42	€14.12	€2,410.00	€2,979.30	€569.30	19.11%
Q3 2010	747	€17.39	€20.52	€12,993.55	€15,330.10	€2,336.55	15.24%
Q3 2010	417	€16.53	€18.32	€6,894.00	€7,639.30	€745.30	9.76%
Q3 2010	1,010	€16.31	€19.08	€16,471.15	€19,271.60	€2,800.45	14.53%
Q3 2010	188	€14.26	€14.01	€2,681.65	€2,634.40	-€47.25	-1.79%
Q3 2010	1,136	€23.28	€26.11	€26,445.60	€29,658.60	€3,213.00	10.83%
Q3 2010	584	€36.56	€36.75	€21,353.80	€21,461.60	€107.80	0.50%
Q3 2010	1,754	€22.56	€25.54	€39,567.15	€44,795.20	€5,228.05	11.67%
Q3 2010	256	€16.19	€16.05	€4,144.40	€4,109.80	-€34.60	-0.84%
Q4 2010	571	€16.69	€24.22	€9,528.10	€13,830.60	€4,302.50	31.11%

Figure 49

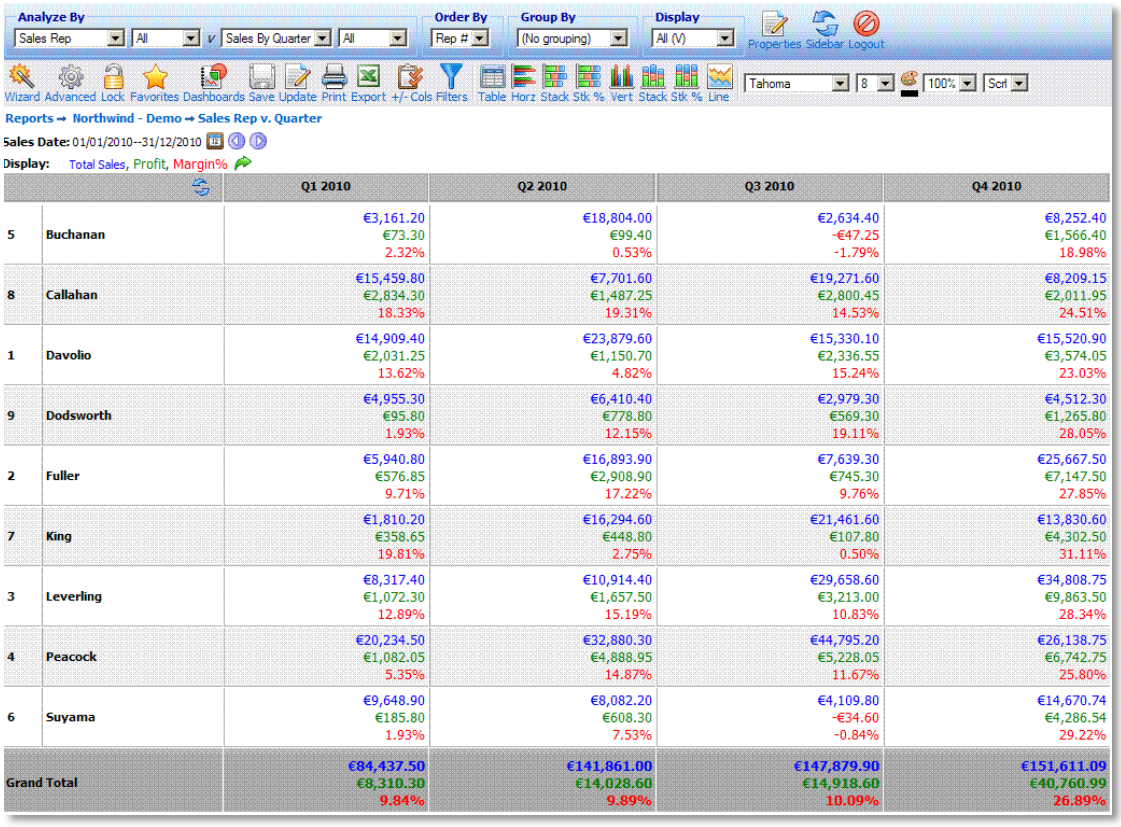


Rep #	Name	Quarter	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
1	Davolio	Q1 2010	623	€20.67	€23.93	€12,878.15	€14,909.40	€2,031.25	13.62%
1	Davolio	Q2 2010	997	€22.80	€23.95	€22,728.90	€23,879.60	€1,150.70	4.82%
1	Davolio	Q4 2010	617	€19.36	€25.16	€11,946.85	€15,520.90	€3,574.05	23.03%
1	Davolio	Q3 2010	747	€17.39	€20.52	€12,993.55	€15,330.10	€2,336.55	15.24%
2	Fuller	Q3 2010	417	€16.53	€18.32	€6,894.00	€7,639.30	€745.30	9.76%
2	Fuller	Q4 2010	912	€20.31	€28.14	€18,520.00	€25,667.50	€7,147.50	27.85%
2	Fuller	Q1 2010	281	€19.09	€21.14	€5,363.95	€5,940.80	€576.85	9.71%
2	Fuller	Q2 2010	804	€17.39	€21.01	€13,985.00	€16,893.90	€2,908.90	17.22%
3	Leverling	Q3 2010	1,136	€23.28	€26.11	€26,445.60	€29,658.60	€3,213.00	10.83%
3	Leverling	Q1 2010	485	€14.94	€17.15	€7,245.10	€8,317.40	€1,072.30	12.89%
3	Leverling	Q4 2010	1,161	€21.49	€29.98	€24,945.25	€34,808.75	€9,863.50	28.34%
3	Leverling	Q2 2010	455	€20.34	€23.99	€9,256.90	€10,914.40	€1,657.50	15.19%
4	Peacock	Q3 2010	1,754	€22.56	€25.54	€39,567.15	€44,795.20	€5,228.05	11.67%
4	Peacock	Q4 2010	951	€20.40	€27.49	€19,396.00	€26,138.75	€6,742.75	25.80%
4	Peacock	Q2 2010	1,386	€20.20	€23.72	€27,991.35	€32,880.30	€4,888.95	14.87%
4	Peacock	Q1 2010	826	€23.19	€24.50	€19,152.45	€20,234.50	€1,082.05	5.35%
5	Buchanan	Q2 2010	534	€35.03	€35.21	€18,704.60	€18,804.00	€99.40	0.53%
5	Buchanan	Q3 2010	188	€14.26	€14.01	€2,681.65	€2,634.40	-€47.25	-1.79%
5	Buchanan	Q4 2010	370	€18.07	€22.30	€6,686.00	€8,252.40	€1,566.40	18.98%
5	Buchanan	Q1 2010	244	€12.66	€12.96	€3,087.90	€3,161.20	€73.30	2.32%
6	Suyama	Q4 2010	485	€21.41	€30.25	€10,384.20	€14,670.74	€4,286.54	29.22%
6	Suyama	Q3 2010	256	€16.19	€16.05	€4,144.40	€4,109.80	-€34.60	-0.84%
6	Suyama	Q1 2010	478	€19.80	€20.19	€9,463.10	€9,648.90	€185.80	1.93%
6	Suyama	Q2 2010	485	€15.41	€16.66	€7,473.90	€8,082.20	€608.30	7.53%
7	King	Q4 2010	571	€16.69	€24.22	€9,528.10	€13,830.60	€4,302.50	31.11%
7	King	Q1 2010	130	€11.17	€13.92	€1,451.55	€1,810.20	€358.65	19.81%
7	King	Q2 2010	355	€44.64	€45.90	€15,845.80	€16,294.60	€448.80	2.75%
7	King	Q3 2010	584	€36.56	€36.75	€21,353.80	€21,461.60	€107.80	0.50%

Figure 50

4.8 Pivot Report

A typical **'Pivot'** report looks like the one shown in Figure 58. To generate this report you can use either the wizard or the advanced interfaces, as described in the previous chapters, to view Sales Rep vs Sales by Quarter for the year 2010, and select to view all pivot quantities. The values for Sales Rrep specify the rows of the pivot report, and the values of Sales by Month specify its columns. The rows and columns may be interchanged by clicking the **'Switch'** icon at the top left cell of the table.

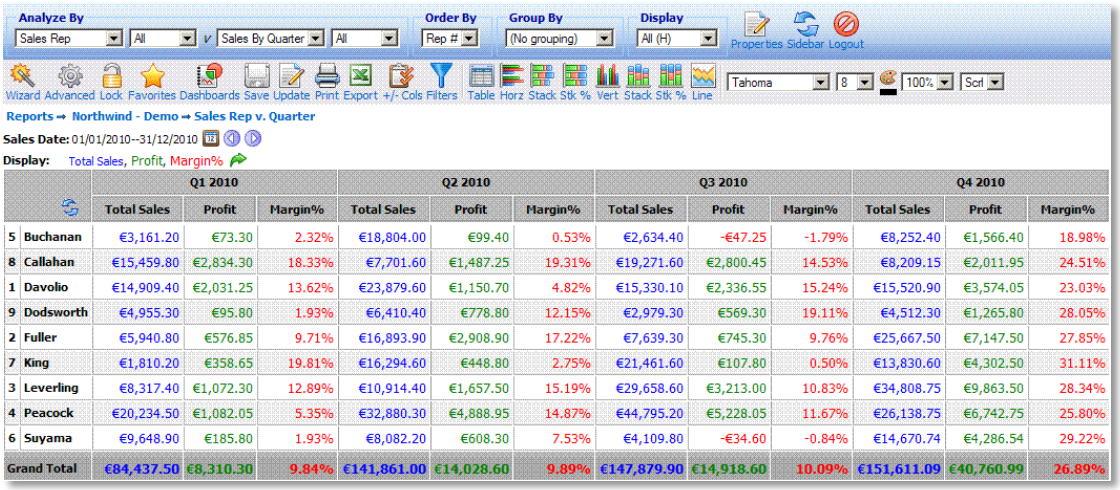


		Q1 2010	Q2 2010	Q3 2010	Q4 2010
5	Buchanan	€3,161.20 €73.30 2.32%	€18,804.00 €99.40 0.53%	€2,634.40 -€47.25 -1.79%	€8,252.40 €1,566.40 18.98%
8	Callahan	€15,459.80 €2,834.30 18.33%	€7,701.60 €1,487.25 19.31%	€19,271.60 €2,800.45 14.53%	€8,209.15 €2,011.95 24.51%
1	Davolio	€14,909.40 €2,031.25 13.62%	€23,879.60 €1,150.70 4.82%	€15,330.10 €2,336.55 15.24%	€15,520.90 €3,574.05 23.03%
9	Dodsworth	€4,955.30 €95.80 1.93%	€6,410.40 €778.80 12.15%	€2,979.30 €569.30 19.11%	€4,512.30 €1,265.80 28.05%
2	Fuller	€5,940.80 €576.85 9.71%	€16,893.90 €2,908.90 17.22%	€7,639.30 €745.30 9.76%	€25,667.50 €7,147.50 27.85%
7	King	€1,810.20 €358.65 19.81%	€16,294.60 €448.80 2.75%	€21,461.60 €107.80 0.50%	€13,830.60 €4,302.50 31.11%
3	Leverling	€8,317.40 €1,072.30 12.89%	€10,914.40 €1,657.50 15.19%	€29,658.60 €3,213.00 10.83%	€34,808.75 €9,863.50 28.34%
4	Peacock	€20,234.50 €1,082.05 5.35%	€32,880.30 €4,888.95 14.87%	€44,795.20 €5,228.05 11.67%	€26,138.75 €6,742.75 25.80%
6	Suyama	€9,648.90 €185.80 1.93%	€8,082.20 €608.30 7.53%	€4,109.80 -€34.60 -0.84%	€14,670.74 €4,286.54 29.22%
Grand Total		€84,437.50 €8,310.30 9.84%	€141,861.00 €14,028.60 9.89%	€147,879.90 €14,918.60 10.09%	€151,611.09 €40,760.99 26.89%

Figure 51

Buttons for pivot reports are similar to the ones for a standard report, with the only difference appearing at which charting options are available for the pivot reports. Data may be horizontally and vertically charted and displayed in both stacked and group format. Pie charts are not available on pivots. Note, also, that the charting options are not available in grouped pivot reports.

The navigation filters section of the report now displays the list of variables that have been selected for the pivot report. In the report of Figure 58, the display shows Total Sales, Profit, and Margin%, since all pivot quantities have been selected for this particular report. The colour and size of the display fields matches the one used within a table as an indicator of which number in the table represents which variable. If only one pivot variable is selected, this formatting is dropped. The switch table format icon next to the pivot display quantities changes the layout of the pivot table between the one shown in Figure 58 in which the pivot data are shown vertically in one cell, and the one in which the data are displayed horizontally with each data value shown in its own individual cell, Figure 59.

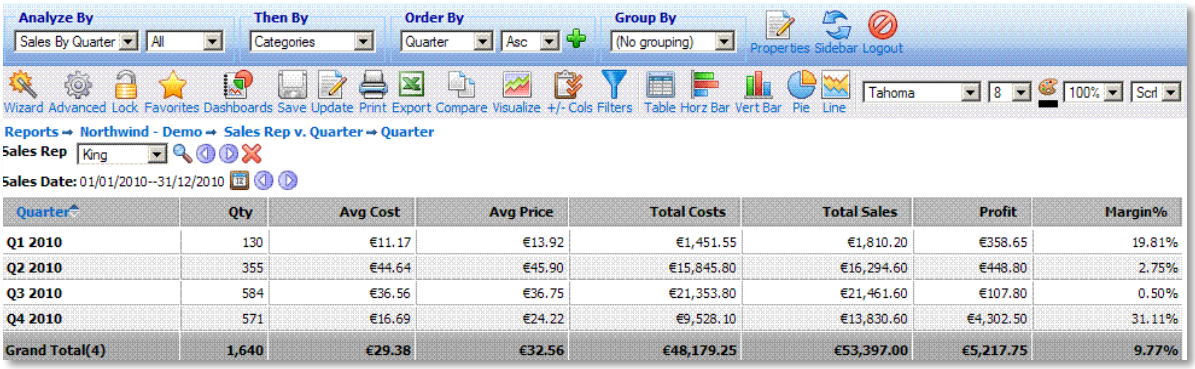


		Q1 2010			Q2 2010			Q3 2010			Q4 2010		
		Total Sales	Profit	Margin%	Total Sales	Profit	Margin%	Total Sales	Profit	Margin%	Total Sales	Profit	Margin%
5	Buchanan	€3,161.20	€73.30	2.32%	€18,804.00	€99.40	0.53%	€2,634.40	-€47.25	-1.79%	€8,252.40	€1,566.40	18.98%
8	Callahan	€15,459.80	€2,834.30	18.33%	€7,701.60	€1,487.25	19.31%	€19,271.60	€2,800.45	14.53%	€8,209.15	€2,011.95	24.51%
1	Davolio	€14,909.40	€2,031.25	13.62%	€23,879.60	€1,150.70	4.82%	€15,330.10	€2,336.55	15.24%	€15,520.90	€3,574.05	23.03%
9	Dodsworth	€4,955.30	€95.80	1.93%	€6,410.40	€778.80	12.15%	€2,979.30	€569.30	19.11%	€4,512.30	€1,265.80	28.05%
2	Fuller	€5,940.80	€576.85	9.71%	€16,893.90	€2,908.90	17.22%	€7,639.30	€745.30	9.76%	€25,667.50	€7,147.50	27.85%
7	King	€1,810.20	€358.65	19.81%	€16,294.60	€448.80	2.75%	€21,461.60	€107.80	0.50%	€13,830.60	€4,302.50	31.11%
3	Leverling	€8,317.40	€1,072.30	12.89%	€10,914.40	€1,657.50	15.19%	€29,658.60	€3,213.00	10.83%	€34,808.75	€9,863.50	28.34%
4	Peacock	€20,234.50	€1,082.05	5.35%	€32,880.30	€4,888.95	14.87%	€44,795.20	€5,228.05	11.67%	€26,138.75	€6,742.75	25.80%
6	Suyama	€9,648.90	€185.80	1.93%	€8,082.20	€608.30	7.53%	€4,109.80	-€34.60	-0.84%	€14,670.74	€4,286.54	29.22%
Grand Total		€84,437.50	€8,310.30	9.84%	€141,861.00	€14,028.60	9.89%	€147,879.90	€14,918.60	10.09%	€151,611.09	€40,760.99	26.89%

Figure 52

From a pivot report, one may zoom-in to a greater level of detail in two different ways. You may click on a:

- **Row heading** – this will produce a simple report, which has been filtered to only include data from the row clicked. For example, clicking the row heading King of Figure 58 generates the standard report of Figure 60.
- **Data figure** – this will produce a simple report filtered to include only those data that contribute to this particular figure, i.e. filtered to include data from both the relevant row and column. Clicking a data value from within the table results produces such a report. For example, clicking the Total Sales data number for Callahan and Q3 2010 of the report of Figure 58 generates the standard report of Figure 61.



Quarter	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
Q1 2010	130	€11.17	€13.92	€1,451.55	€1,810.20	€358.65	19.81%
Q2 2010	355	€44.64	€45.90	€15,845.80	€16,294.60	€448.80	2.75%
Q3 2010	584	€36.56	€36.75	€21,353.80	€21,461.60	€107.80	0.50%
Q4 2010	571	€16.69	€24.22	€9,528.10	€13,830.60	€4,302.50	31.11%
Grand Total(4)	1,640	€29.38	€32.56	€48,179.25	€53,397.00	€5,217.75	9.77%

Figure 53

Category	Description	Qty	Avg Cost	Avg Price	Total Costs	Total Sales	Profit	Margin%
1	Beverages	45	€11.47	€12.58	€516.25	€566.00	€49.75	8.79%
3	Confections	42	€4.00	€7.65	€168.00	€321.30	€153.30	47.71%
5	Grains/Cereals	50	€11.40	€11.20	€570.00	€560.00	-€10.00	-1.79%
7	Produce	30	€38.20	€29.28	€1,146.00	€878.40	-€267.60	-30.46%
8	Seafood	21	€13.40	€14.70	€281.40	€308.70	€27.30	8.84%
Grand Total(5)		188	€14.26	€14.01	€2,681.65	€2,634.40	-€47.25	-1.79%

Figure 54

4.9 Chart Report

One of BIforMYOB most powerful features is its ability to provide interactive charts of data. When performing straightforward 1-D analyses (as described earlier), one may zoom-in to the next level of detail by clicking on a link. This unique feature is also available through charts.

A typical **'Chart'** report looks like the one shown in Figure 62. To generate this report you can use either the wizard or the advanced interfaces, as described in the previous chapters, to view Sales by Month as a horizontal chart bar for the year 2010, and select to view Total Sales.

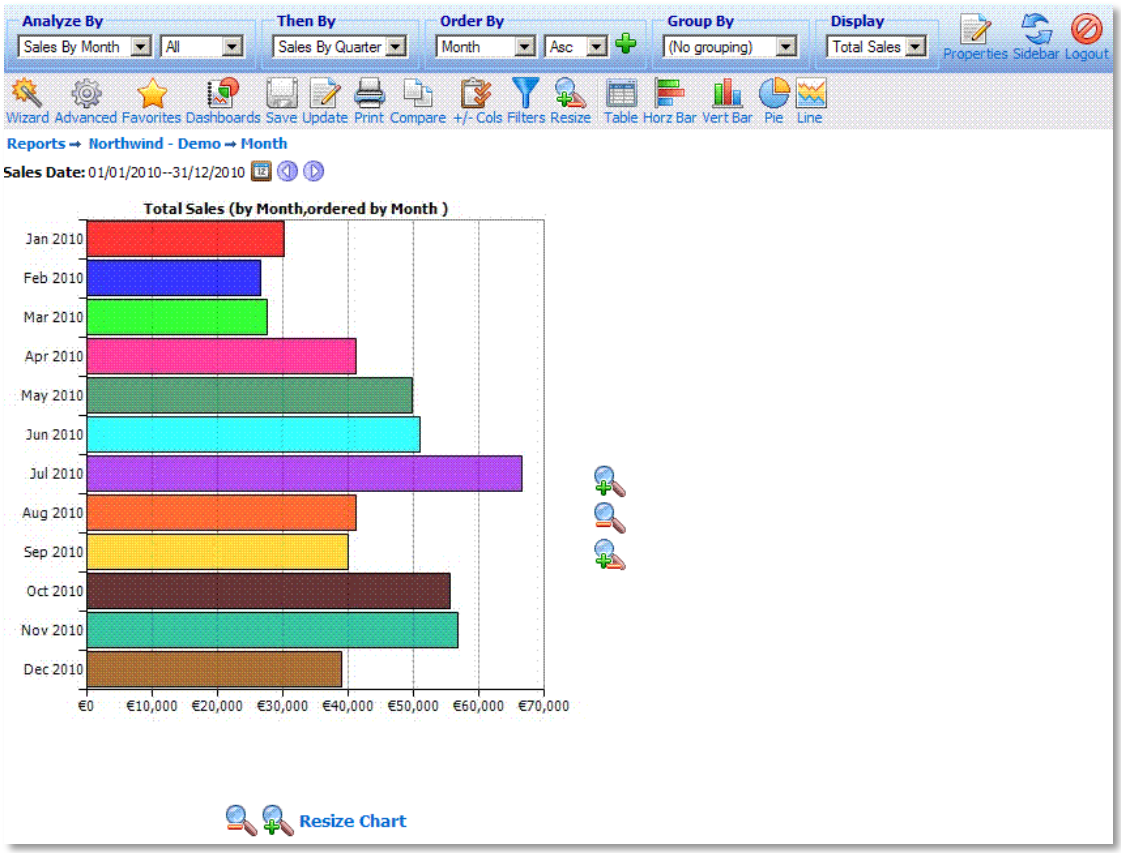


Figure 55

The chart reports functionality buttons provide one more configuration option, mainly the ability to modify the size of the chart to adjust it to the browser's dimensions. To achieve this click the **'Resize'** button. A new page, Figure 63, opens and the user can then select the width and/or height of their choice. Or they can simply select to fit the chart into their browser's screen size. When finished with the size adjustment simply click the 'Done' button to return to the report page where the chart with the new dimensions is displayed. Similar options are available at the side and bottom of the chart reports, which enlarge/reduce the size of the chart by a predefined amount along a specific dimension or resize the chart according to the user's will.

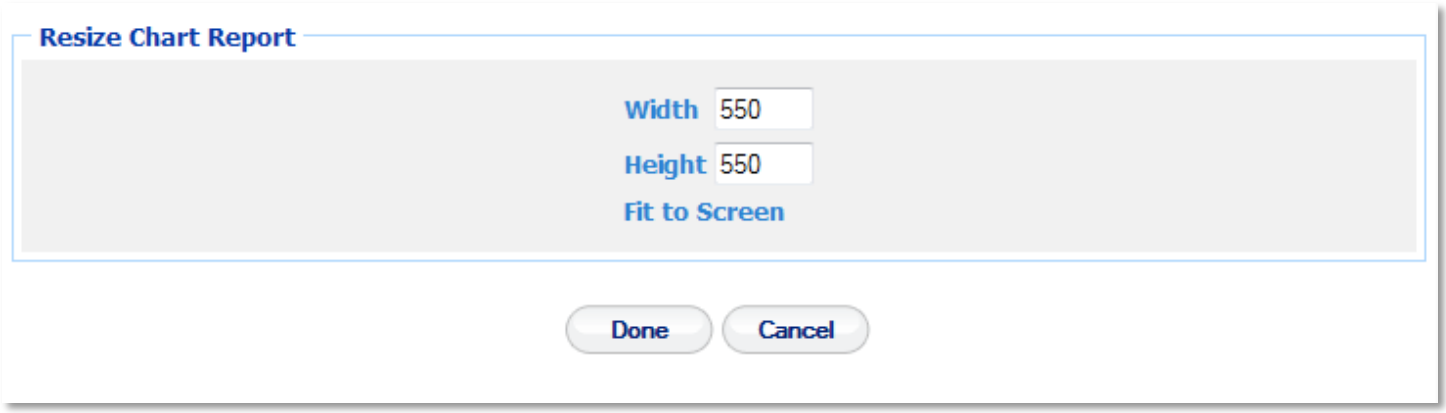


Figure 56

Just as tables allow drill-down, so do charts. For example, clicking on the bar associated with the May 2010 volume, will give a bar-chart of the performance during that quarter (similarly to zooming-in with the tabular **'Analyze'** report). As before, one may recursively drill-down until the greatest level of granularity is attained.

Just as one can group the results of a simple tabular analysis, one can also produce corresponding grouped charts. One simply changes the **'Group by'** dropdown from **'No Grouping'** to the desired grouping option. There are several ways in which the data may be grouped within the chart. One may produce grouped, stacked or stacked

-% versions of the bar charts. Clicking on the **'Switch'** icon alternates the displayed and the grouping by fields. A grouped chart looks like the one shown in Figure 64. The stacked version of the same report appears at Figure 65.

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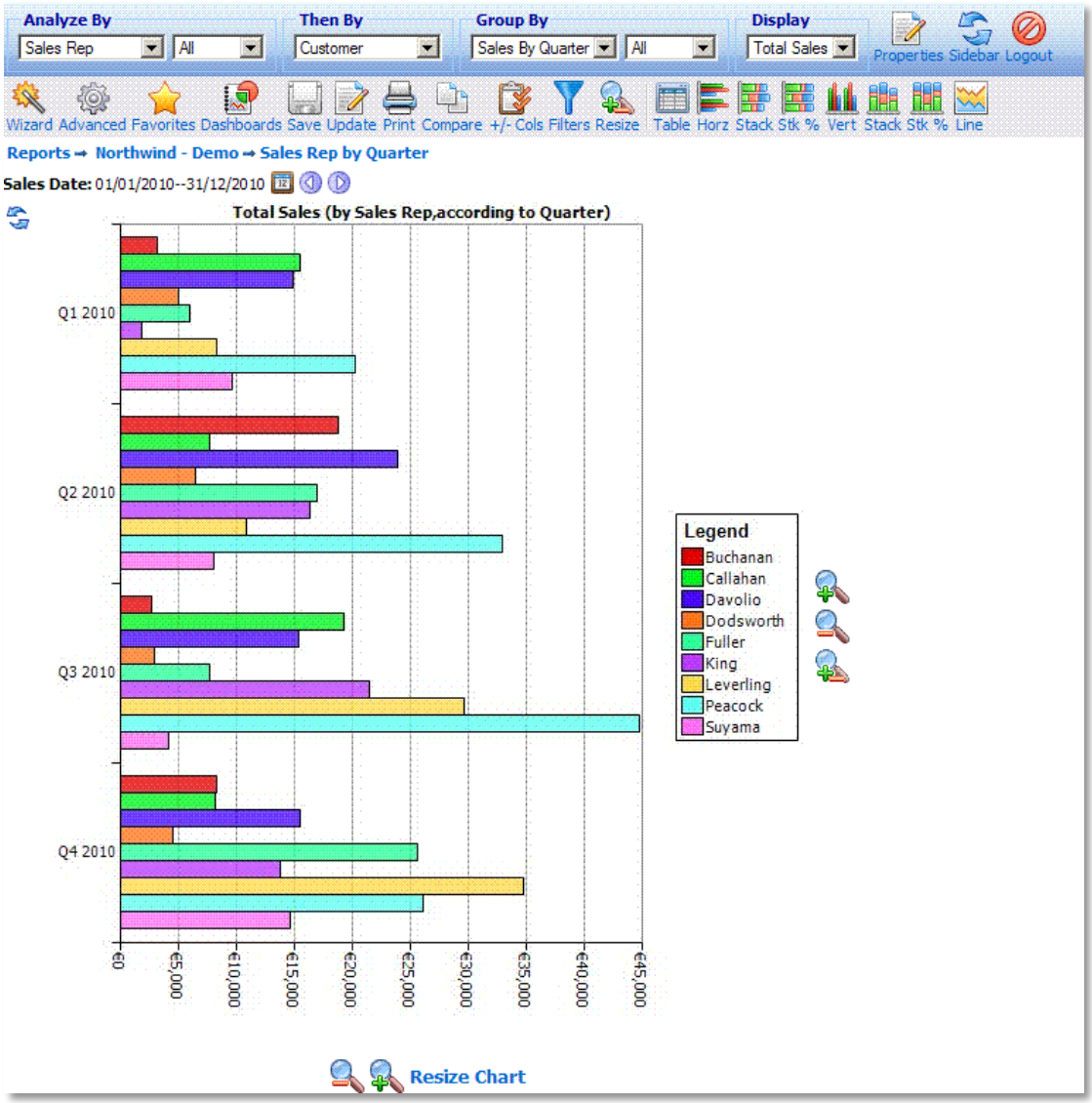

Analyze By
Sales Rep
All
Then By
Customer
Group By
Sales By Quarter
All
Display
Total Sales
Properties
Sidebar
Logout
Wizard
Advanced
Favorites
Dashboards
Save
Update
Print
Compare
+/- Cols
Filters
Resize
Table
Horz
Stack
Stk %
Vert
Stack
Stk %
Line
Reports ➡ Northwind - Demo ➡ Sales Rep by Quarter
Sales Date: 01/01/2010--31/12/2010
Total Sales (by Sales Rep,according to Quarter)
Q1 2010
Q2 2010
Q3 2010
Q4 2010
€0
€5,000
€10,000
€15,000
€20,000
€25,000
€30,000
€35,000
€40,000
€45,000
Legend
Buchanan
Callahan
Davolio
Dodsworth
Fuller
King
Leverling
Peacock
Suyama
Resize Chart

Figure 57

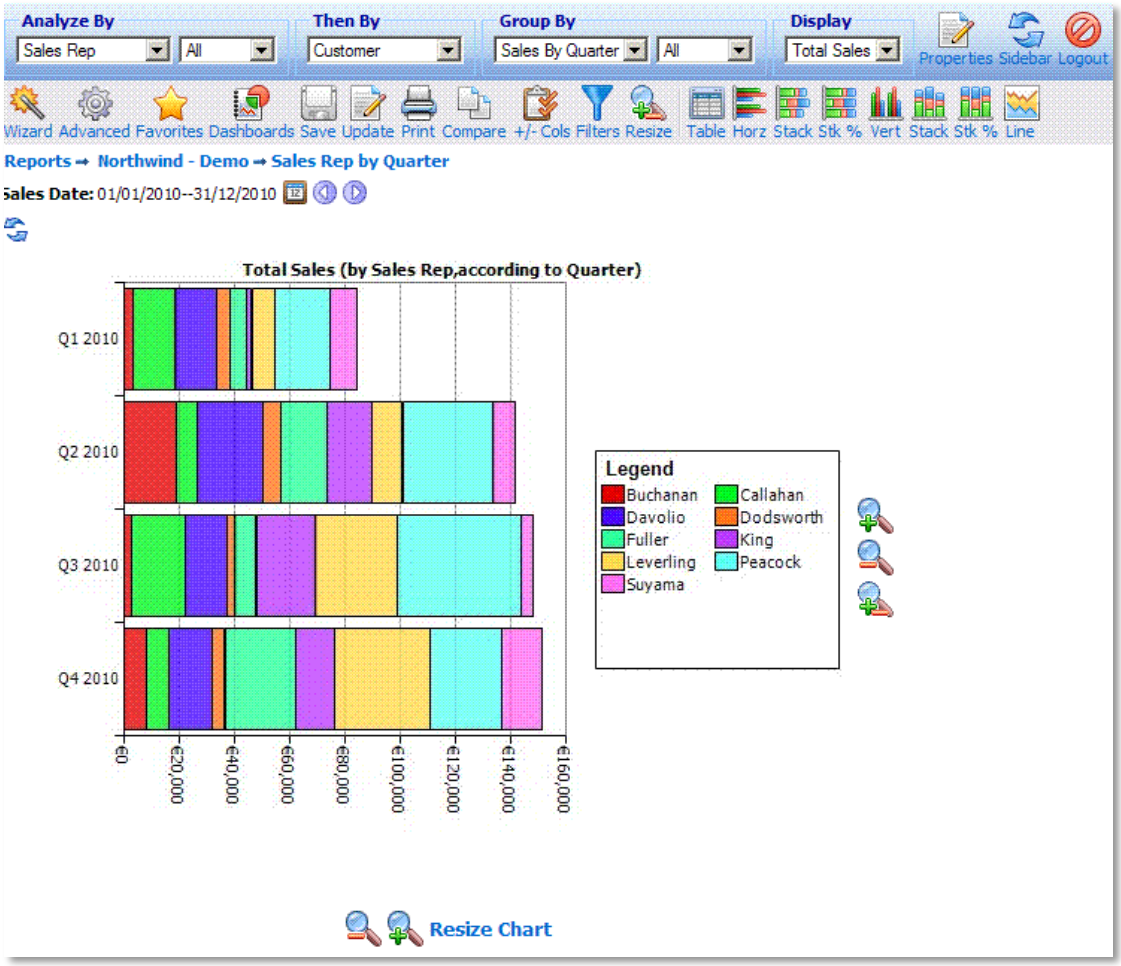


Figure 58

Chart reports can be greatly enhanced by applying an extensive set of properties, as shown in the **'Properties'** options, which appear on a new popup window when clicking the relative button of the report variables. Figure 66 shows the properties that can be applied to a pie chart. The effect of some of the properties on a pie chart can be viewed on Figure 67.

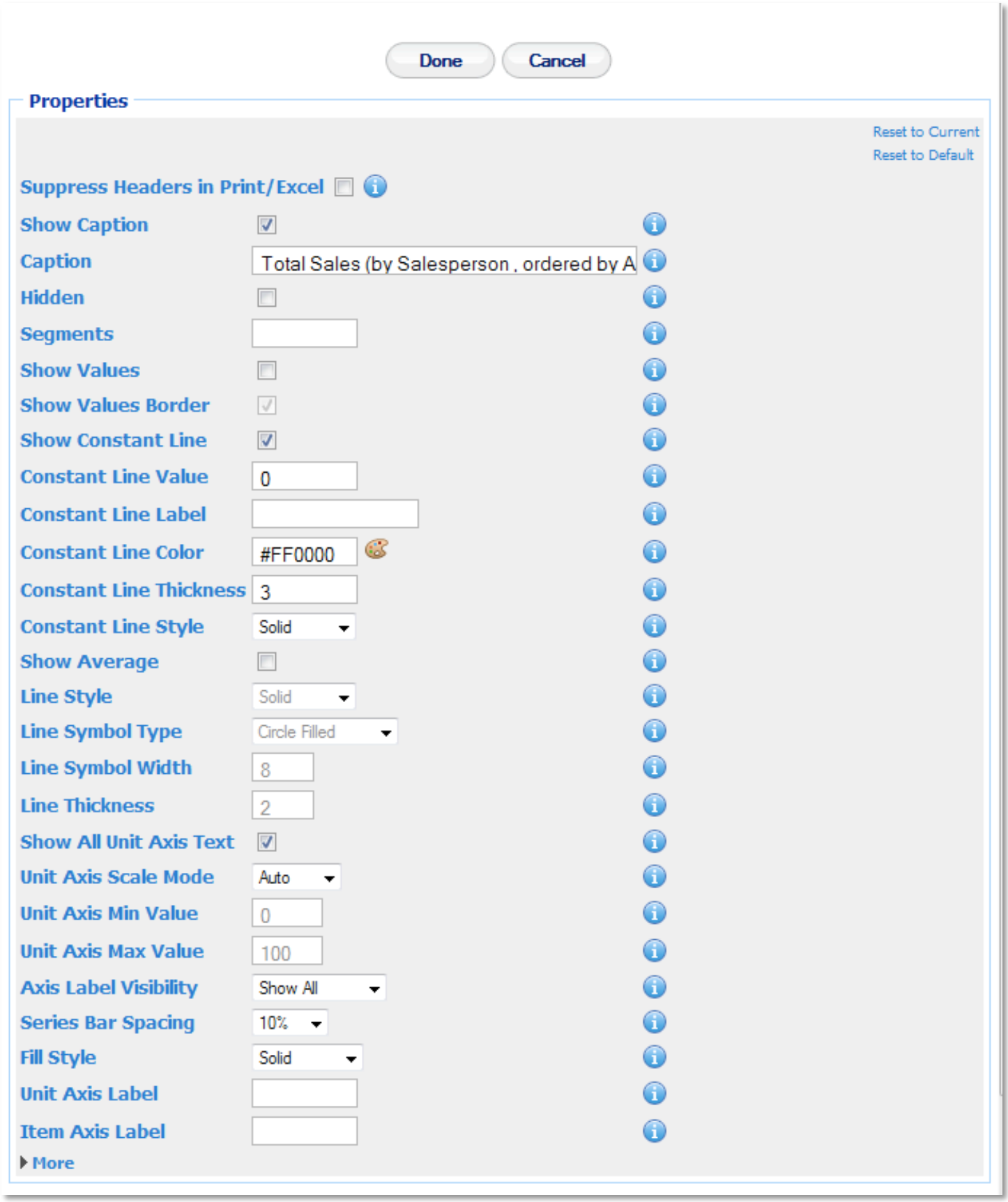


Figure 59

 © Interactive Reporting

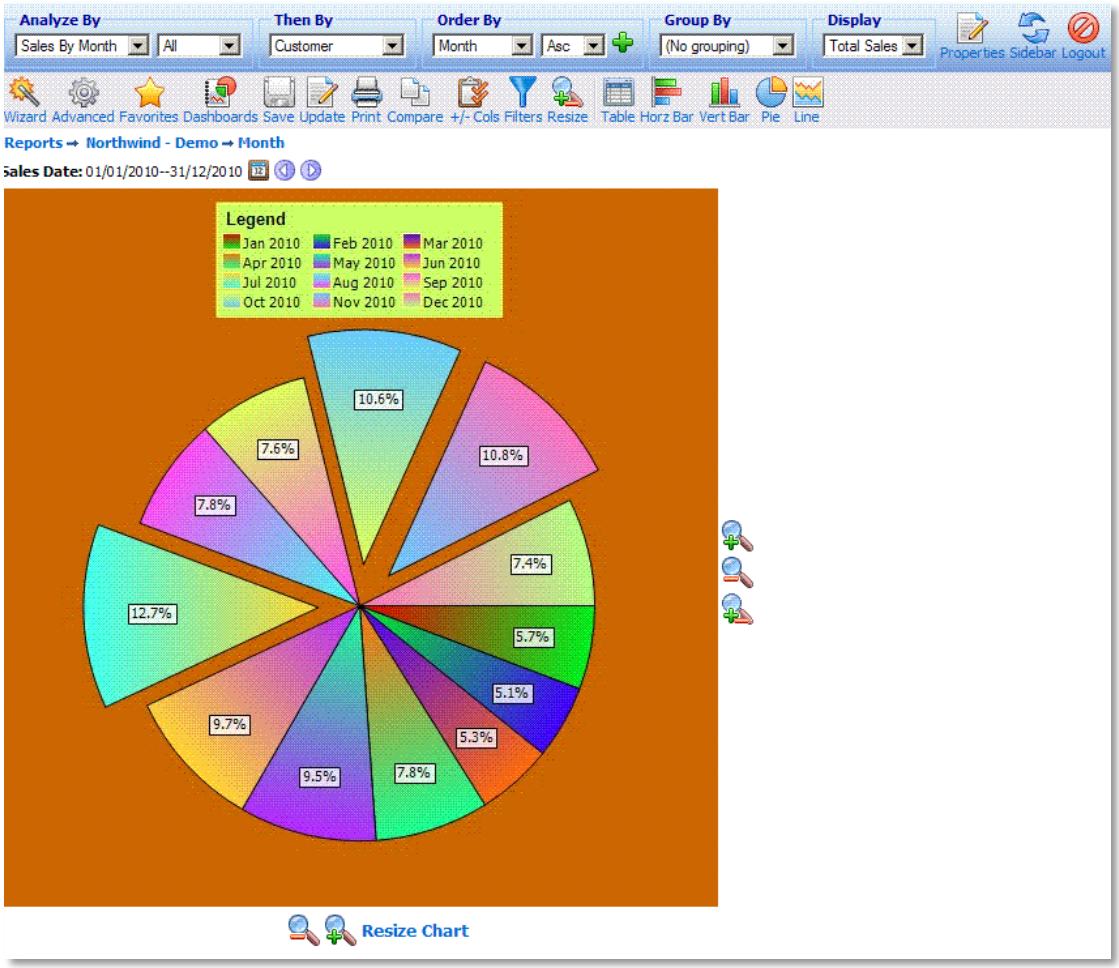


Figure 60

The **'Properties'** options in charts can also enhance the information displayed in some of the charts by allowing the user to display **'Constant'** lines and/or **'Averages'** on top of the chart data. These options are available for Horz,Vert and Line charts, and can be set from their properties options as shown in Figure 68. Figure 69 shows a Vert Chart on which a constant line for Target Sales is shown, as well as the average Total Sales for the year 2010.

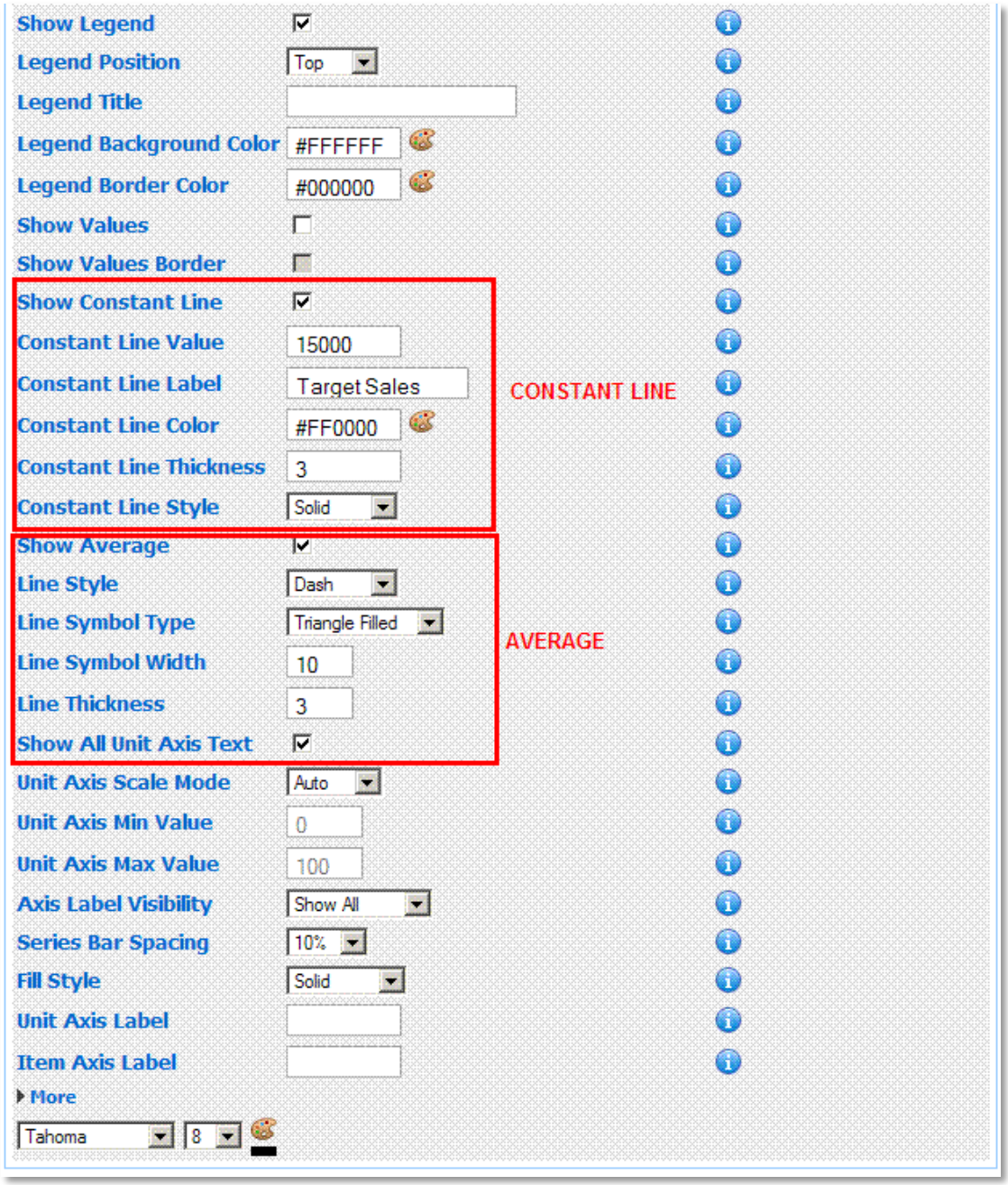


Figure 61

 © Interactive Reporting

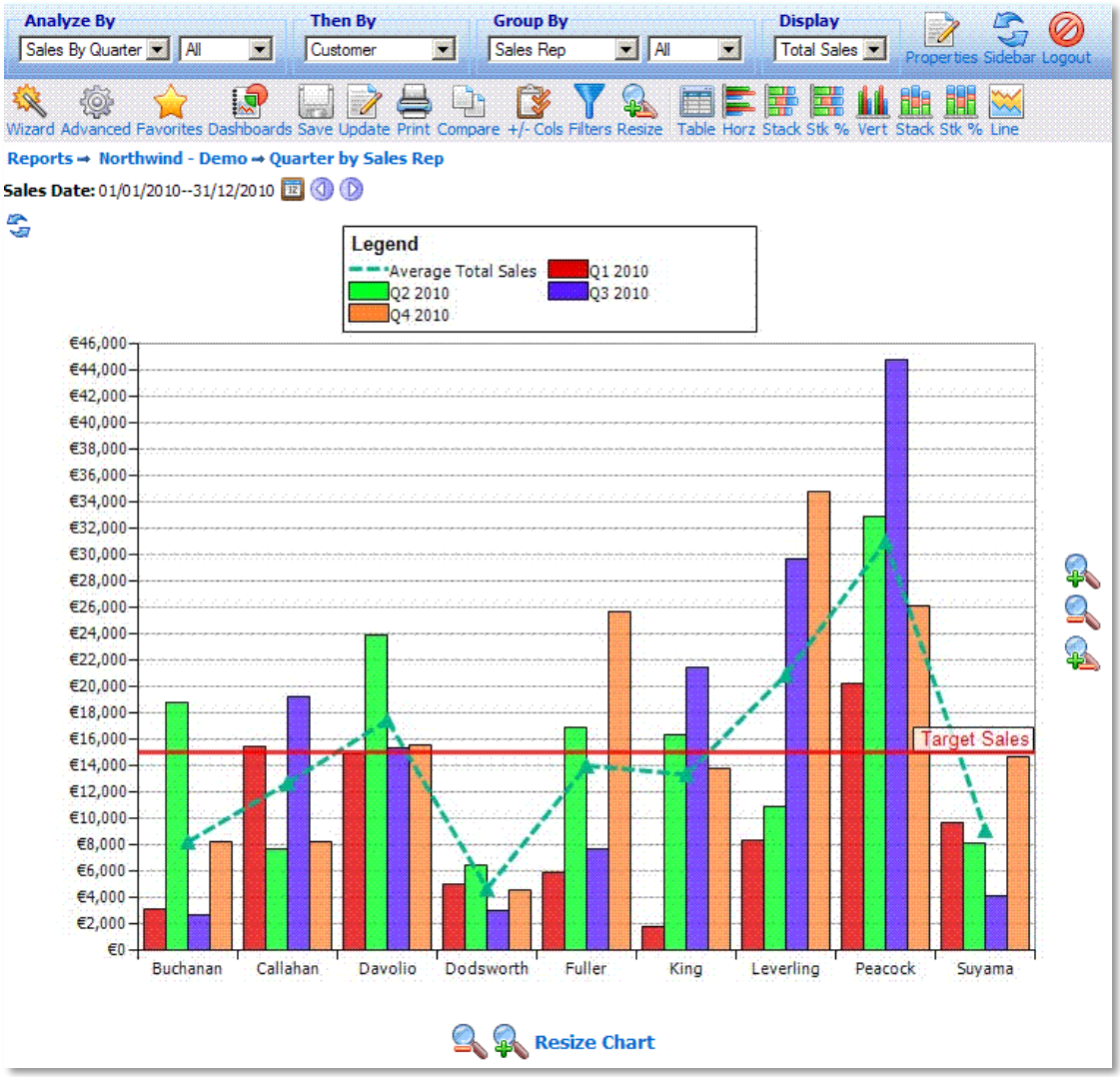
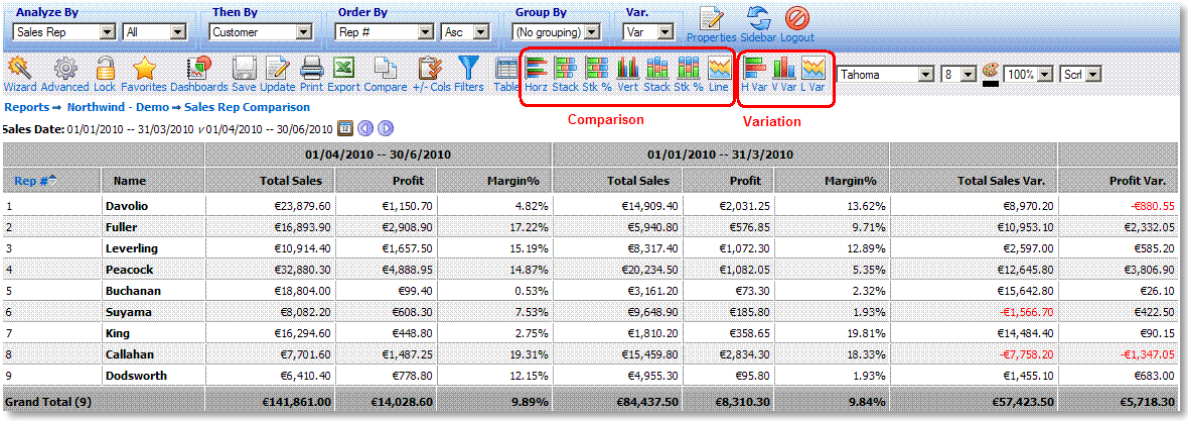

Analyze By
Sales By Quarter
All
Then By
Customer
Group By
Sales Rep
All
Display
Total Sales
Properties
Sidebar
Logout
Wizard
Advanced
Favorites
Dashboards
Save
Update
Print
Compare
+/- Cols
Filters
Resize
Table
Horz
Stack
Stk %
Vert
Stack
Stk %
Line
Reports ➡ Northwind - Demo ➡ Quarter by Sales Rep
Sales Date: 01/01/2010--31/12/2010
Legend
Average Total Sales
Q1 2010
Q2 2010
Q3 2010
Q4 2010
€46,000
€44,000
€42,000
€40,000
€38,000
€36,000
€34,000
€32,000
€30,000
€28,000
€26,000
€24,000
€22,000
€20,000
€18,000
€16,000
€14,000
€12,000
€10,000
€8,000
€6,000
€4,000
€2,000
€0
Target Sales
Buchanan
Callahan
Davolio
Dodsworth
Fuller
King
Leverling
Peacock
Suyama
Resize Chart

Figure 62

4.11 Comparison Report

Another potent option that BIforMYOB offers is its ability to compare data across different time periods. A typical **'Comparison'** report looks like the one shown in Figure 79. To generate this report you can use either the wizard or the advanced interfaces, as described in the previous chapters, to compare Sales Rep data between the first and the second quarter of 2010. The comparison report can also viewed in the vertical layout, Figure 80, with the labels appearing in rows and the data in columns, by modifying the **'Layout'** property, as shown in Figure 51.

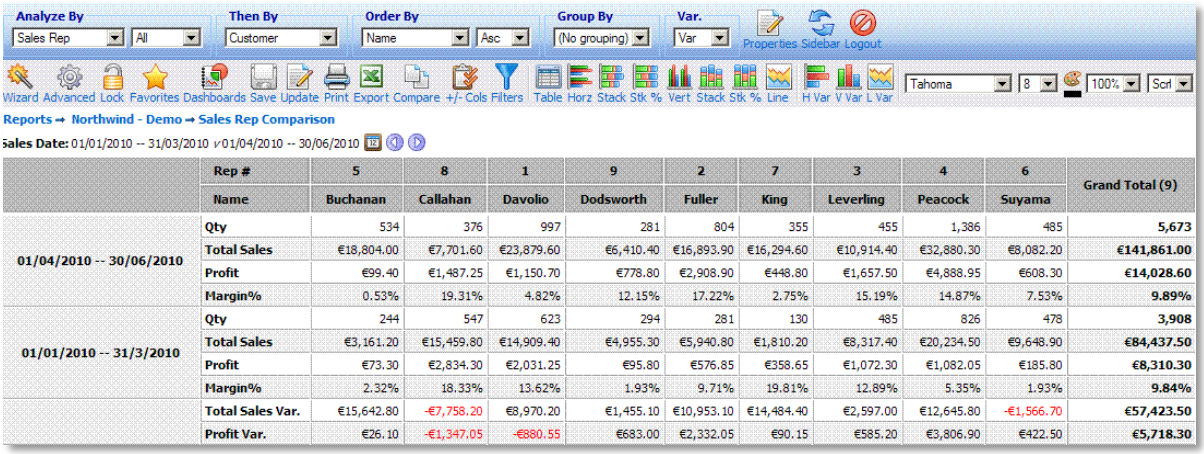


Reports ➡ Northwind - Demo ➡ Sales Rep Comparison

Sales Date: 01/01/2010 -- 31/03/2010 v 01/04/2010 -- 30/06/2010

		01/04/2010 -- 30/6/2010			01/01/2010 -- 31/3/2010				
Rep #	Name	Total Sales	Profit	Margin%	Total Sales	Profit	Margin%	Total Sales Var.	Profit Var.
1	Davolio	€23,879.60	€1,150.70	4.82%	€14,909.40	€2,031.25	13.62%	€8,970.20	-€880.55
2	Fuller	€16,893.90	€2,908.90	17.22%	€5,940.80	€576.85	9.71%	€10,953.10	€2,332.05
3	Leverling	€10,914.40	€1,657.50	15.19%	€8,317.40	€1,072.30	12.89%	€2,597.00	€585.20
4	Peacock	€32,880.30	€4,888.95	14.87%	€20,234.50	€1,082.05	5.35%	€12,645.80	€3,806.90
5	Buchanan	€18,804.00	€99.40	0.53%	€3,161.20	€73.30	2.32%	€15,642.80	€26.10
6	Suyama	€8,082.20	€608.30	7.53%	€9,648.90	€185.80	1.93%	-€1,566.70	€422.50
7	King	€16,294.60	€448.80	2.75%	€1,810.20	€358.65	19.81%	€14,484.40	€90.15
8	Callahan	€7,701.60	€1,487.25	19.31%	€15,459.80	€2,834.30	18.33%	-€7,758.20	-€1,347.05
9	Dodsworth	€6,410.40	€778.80	12.15%	€4,955.30	€95.80	1.93%	€1,455.10	€683.00
Grand Total (9)		€141,861.00	€14,028.60	9.89%	€84,437.50	€8,310.30	9.84%	€57,423.50	€5,718.30

Figure 63



Reports ➡ Northwind - Demo ➡ Sales Rep Comparison

Sales Date: 01/01/2010 -- 31/03/2010 v 01/04/2010 -- 30/06/2010

	Rep #	5	8	1	9	2	7	3	4	6	Grand Total (9)
	Name	Buchanan	Callahan	Davolio	Dodsworth	Fuller	King	Leverling	Peacock	Suyama	
01/04/2010 -- 30/06/2010	Qty	534	376	997	281	804	355	455	1,386	485	5,673
	Total Sales	€18,804.00	€7,701.60	€23,879.60	€6,410.40	€16,893.90	€16,294.60	€10,914.40	€32,880.30	€8,082.20	€141,861.00
	Profit	€99.40	€1,487.25	€1,150.70	€778.80	€2,908.90	€448.80	€1,657.50	€4,888.95	€608.30	€14,028.60
	Margin%	0.53%	19.31%	4.82%	12.15%	17.22%	2.75%	15.19%	14.87%	7.53%	9.89%
01/01/2010 -- 31/3/2010	Qty	244	547	623	294	281	130	485	826	478	3,908
	Total Sales	€3,161.20	€15,459.80	€14,909.40	€4,955.30	€5,940.80	€1,810.20	€8,317.40	€20,234.50	€9,648.90	€84,437.50
	Profit	€73.30	€2,834.30	€2,031.25	€95.80	€576.85	€358.65	€1,072.30	€1,082.05	€185.80	€8,310.30
	Margin%	2.32%	18.33%	13.62%	1.93%	9.71%	19.81%	12.89%	5.35%	1.93%	9.84%
	Total Sales Var.	€15,642.80	-€7,758.20	€8,970.20	€1,455.10	€10,953.10	€14,484.40	€2,597.00	€12,645.80	-€1,566.70	€57,423.50
	Profit Var.	€26.10	-€1,347.05	-€880.55	€683.00	€2,332.05	€90.15	€585.20	€3,806.90	€422.50	€5,718.30

Figure 64

To view a comparison report as a chart the user must click on any of the comparison chart buttons. Changing the format of the comparison report of Figure 79 to chart will generate Figure 81. It is also possible to view chart reports of any variation field present, for example Total Sales Var. of Figure 79, by clicking any variation chart button. Such a report is shown in Figure 82. Pie charts are not available on comparisons. Note, also, that the charting options are not available in grouped comparison reports.

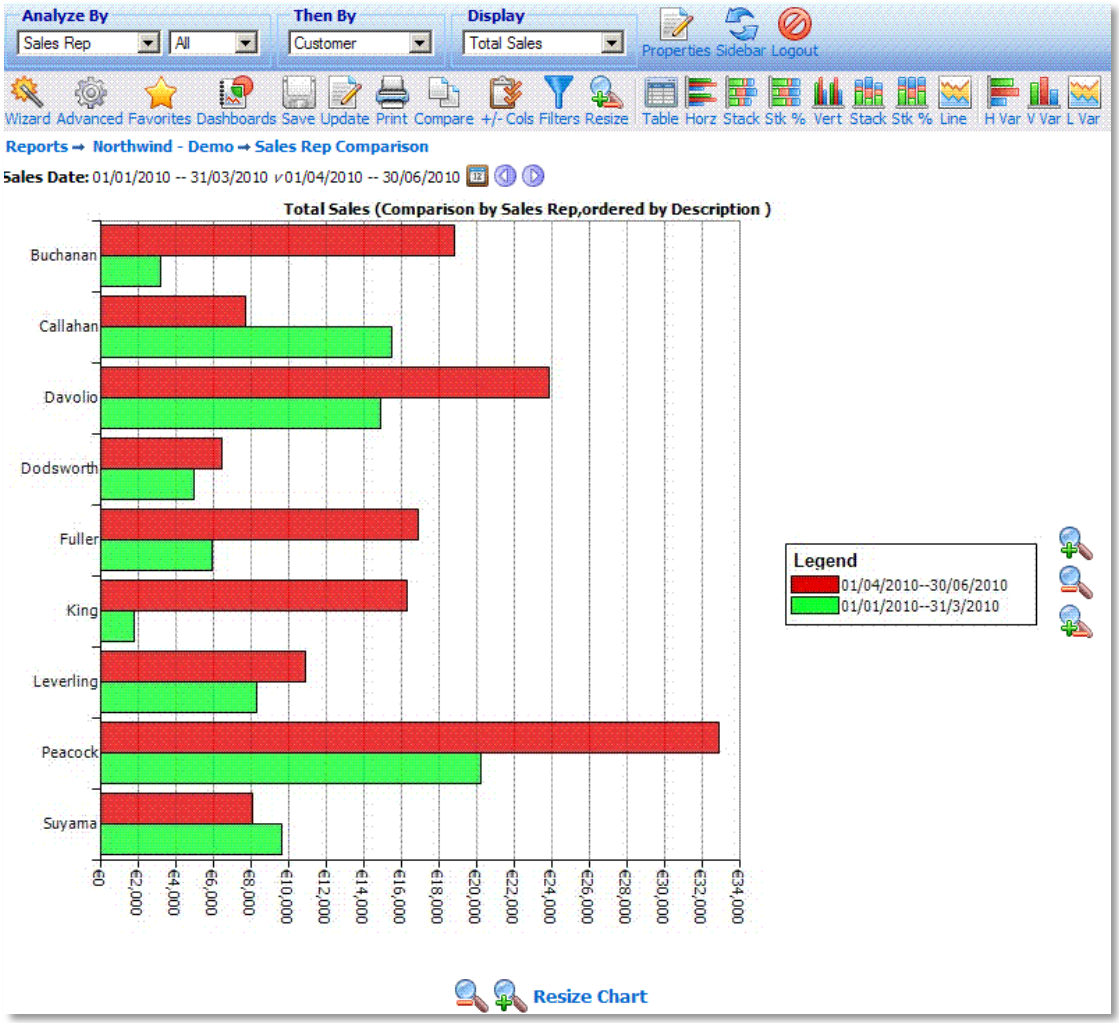

Analyze By
Sales Rep
All
Then By
Customer
Display
Total Sales
Properties
Sidebar
Logout
Wizard
Advanced
Favorites
Dashboards
Save
Update
Print
Compare
+/- Cols
Filters
Resize
Table
Horz
Stack
Stk %
Vert
Stack
Stk %
Line
H Var
V Var
L Var
Reports ➡ Northwind - Demo ➡ Sales Rep Comparison
Sales Date: 01/01/2010 -- 31/03/2010 v 01/04/2010 -- 30/06/2010
Total Sales (Comparison by Sales Rep,ordered by Description)
Buchanan
Callahan
Davolio
Dodsworth
Fuller
King
Leverling
Peacock
Suyama
€0
€2,000
€4,000
€6,000
€8,000
€10,000
€12,000
€14,000
€16,000
€18,000
€20,000
€22,000
€24,000
€26,000
€28,000
€30,000
€32,000
€34,000
Legend
01/04/2010--30/06/2010
01/01/2010--31/3/2010
Resize Chart

Figure 65

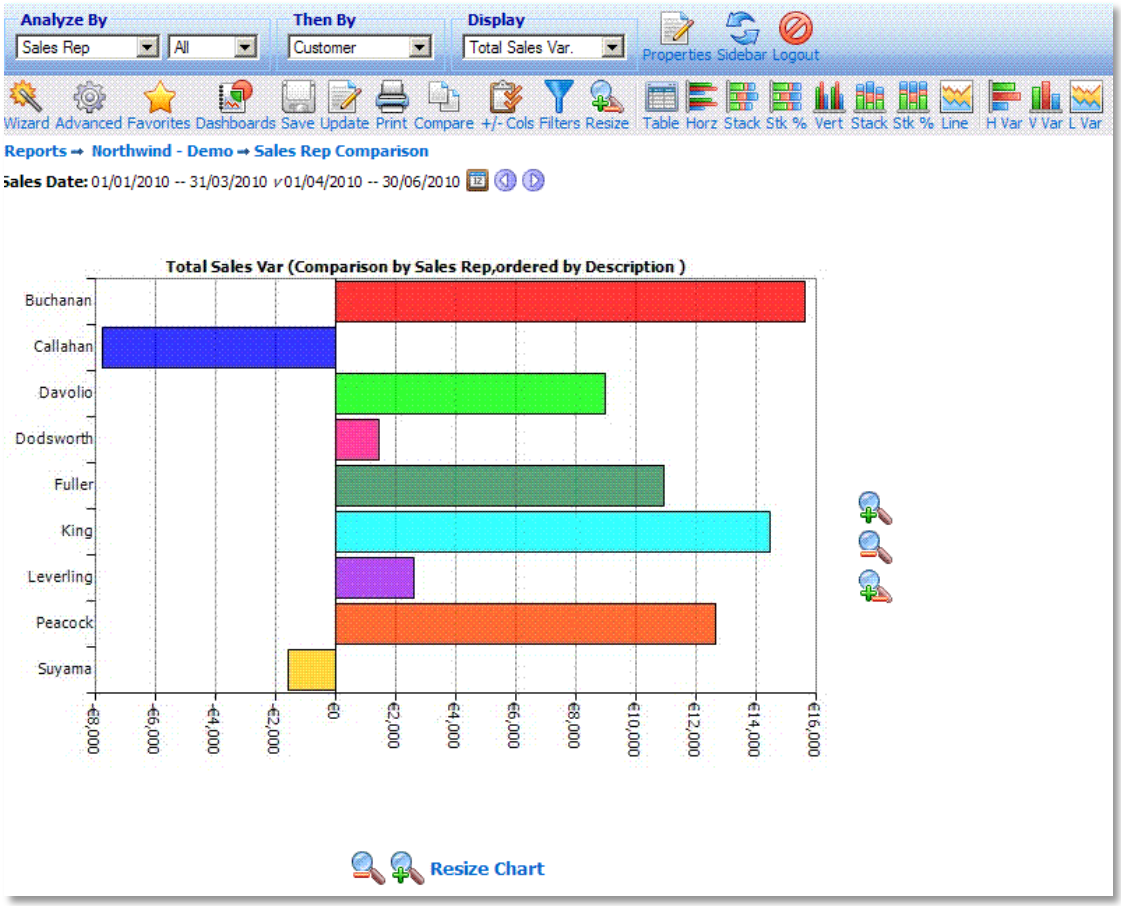

Analyze By
Sales Rep
All
Then By
Customer
Display
Total Sales Var.
Properties
Sidebar
Logout
Wizard
Advanced
Favorites
Dashboards
Save
Update
Print
Compare
+/- Cols
Filters
Resize
Table
Horz
Stack
Stk %
Vert
Stack
Stk %
Line
H Var
V Var
L Var
Reports ➡ Northwind - Demo ➡ Sales Rep Comparison
Sales Date: 01/01/2010 -- 31/03/2010 v 01/04/2010 -- 30/06/2010
Total Sales Var (Comparison by Sales Rep,ordered by Description)
Buchanan
Callahan
Davolio
Dodsworth
Fuller
King
Leverling
Peacock
Suyama
€8,000
€6,000
€4,000
€2,000
€0
€2,000
€4,000
€6,000
€8,000
€10,000
€12,000
€14,000
€16,000
Resize Chart

Figure 66

Customer Support

Still require assistance? For customer support please contact:

Phone: +61 (2) 8912 4120
Email: support@interactivereporting.com.au
Web: www.interactivereporting.com/biformyob

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